

**CONTRACT**  
**FOR SERVICES OVER \$50,000**

\*ANY ALTERATIONS OF CONTRACT LANGUAGE WILL RESULT IN REVOCATION OF CITY ATTORNEY APPROVAL.\*

This Contract for emotional intelligence training services is entered into by and between Sapna Welsh DBA Leverage HR (herein referred to as “Contractor”), and the City of Columbus, Department of Health (herein referred to as “City”).

**WITNESSETH**

WHEREAS, the City has a need for emotional intelligence training services; and

WHEREAS, the Contractor has the necessary experience and expertise to provide said service; and

WHEREAS, this Contract is authorized by Ordinance No. 0935-2024; passed by Columbus City Council on April 29, 2024; and

**NOW, THEREFORE, in consideration of the mutual promises as hereinafter set forth, the parties agree as follows:**

This Contract sets forth the entire agreement between the parties with respect to the subject matter hereof. Understandings, agreements, representations, or warranties not contained in this Contract, or as written amendment hereto, shall not be binding on either party. Except as provided herein, no alteration of any terms, conditions, delivery, price, quality, or specifications of this Contract shall be binding on either party without the written consent of both parties. This Contract is subject to the Ohio Public Records Act.

**1. Contract Term**

The term of this Contract shall be from May 1, 2024 to April 30, 2025. This Contract shall not automatically renew.

**2. Maximum Obligation**

The maximum amount to be paid under any purchase order associated with this Contract shall not exceed \$62,825.00 unless additional funds are appropriated and authorized.

**3. Pricing and Scope of Services**

The Contractor agrees to perform and invoice the Scope of Services as set forth **ON ATTACHED EXHIBIT A\*** and as contained in the bid specifications, which are expressly incorporated herein.

\*Contract is NOT valid if the Scope of Services is NOT attached.

No other costs, rates, or fees shall be payable to the Contractor for services performed hereunder. The terms and conditions specified in this Contract constitute the entire contract governing the purchase of services by the City from the Contractor, and shall supersede any terms and conditions which may accompany Contractor’s invoice/bid/estimate. Any and all verbal representations are superseded by this Contract. The terms of this Contract shall prevail over any conflicting or deficient terms or conditions listed in any attachments from Contractor.

**4. Equal Opportunity Clause**

Contractor agrees to abide by all of the terms, conditions and requirements set forth in Columbus City Code Section 3906.02, Equal Opportunity Clause. Failure or refusal of a Contractor or Subcontractor to comply with the provisions of Title 39 may result in cancellation of this Contract.

**5. Taxes**

Federal or State taxes are not to be included on invoices for the described services. Contractor will be provided an exemption certificate, if needed.

**6. City’s Contract Administrator/Contract Administration**

Annie Delawder will manage the Contract on behalf of the City and will be the principal point of contact for the City concerning the Contractor’s performance under this Contract.

Any notice or demand or other communication required or permitted to be given under this Contract or applicable law shall only be effective if it is in writing, properly addressed, and either delivered in person, or by a recognized courier service, or deposited with the United States Postal Services as first-class certified mail, postage prepaid and return receipt requested, to the parties at the following addresses:

City: Annie Delawder  
Columbus Public Health  
240 Parsons Ave  
Columbus, OH 43215

Contractor: Sapna Welsh  
Leverage HR  
1220 Sea Shell Dr  
Westerville, OH 43082

**7. Contractor as an Independent Contractor**

The Contractor shall be and shall remain an Independent Contractor with respect to all services performed hereunder and neither Contractor nor its employees shall be considered “public employees” for purposes of OPERS membership. Contractor agrees to and does hereby accept full and exclusive liability for the payment of any and all contributions or taxes for Social Security, unemployment insurance or old age retirement benefits, pensions or annuities now or hereafter imposed under any state or federal law which are measured by the wages, salaries or other remunerations paid to the Contractor or persons employed by the Contractor for work performed under the terms of this Agreement and further agrees to obey all lawful rules and regulations and to meet all lawful requirements which are now, or hereafter may be, issued or promulgated under said respective laws.

Individuals utilizing a personal social security number for tax identification purposes and business entities with four (4) or fewer employees must complete and submit, as Exhibit D, the OPERS independent contractor acknowledgment form. THIS FORM CAN BE FOUND AT WWW.OPERS.ORG

**8. Applicable Law, Remedies**

This Agreement shall be governed in accordance with the laws of the State of Ohio and the ordinances, statutes and provisions of the Columbus City Code and Charter; specifically including, but not limited to Charter Sections 159 and 161. All claims, counterclaims, disputes and other matters in question between the City, its agents and employees, and the Contractor arising out of or relating to this Agreement or its breach will be decided in a court of competent jurisdiction within the County of Franklin, State of Ohio.

Chapter 377 of the Columbus City Codes is hereby incorporated into the contract and Contractor is required to comply with said chapter. This includes, but is not limited to reporting requirements and the obligation to review the commission list of contractors and subcontractors that received an adverse determination. Penalties for failure to comply with the wage theft prevention code included suspension for three years, up to permanent disbarment.

**9. Payment/Invoice Submittal**

Fees shall be paid for services rendered following: (1) the City’s receipt of a correct invoice, which designates the specific applicable charges, and (2) issuance of a certified purchase order. The City will not be subject to any late payment charges. Rates shall be firm during the term of this Contract. The City will process correctly documented invoices for payment and Contractor should receive payment for such invoice within thirty (30) days from receipt and approval by the City.

**Invoices:** All invoices shall be submitted to the address listed on the Purchase Order.

**10. Modifications**

No modification, amendment, alteration, addition or waiver of any section or condition of this Contract shall be effective or binding unless it is in writing and signed by an authorized representative of the City and the Contractor and approved by the appropriate City authorities.

**11. Contract Termination**

If either the City or the Contractor violates any material term or condition of this Contract or fails to fulfill in a timely and proper manner its obligations under this Contract, then the aggrieved party shall give the other party (the “responsible party”) written notice of such failure or violation. The responsible party will correct the violation or failure within thirty (30) calendar days or as otherwise mutually agreed. If the failure or violation is not corrected, this Contract may be terminated immediately by written notice from the aggrieved party. The option to terminate shall be at the sole discretion of the aggrieved party.

When it is in the best interest of the City, the City may terminate this Contract, in whole or in part by providing seven (7) calendar days written notice to the Contractor prior to the effective date of termination. If this Contract is so terminated, the City is liable only for payments required by the terms of this Contract for services received and accepted by the City.

**12. Nonexclusive Remedies**

The remedies provided for in this Contract shall not be exclusive but are in addition to all other remedies available under the law.

**13. Survivorship**

All services executed pursuant to the authority of this Contract shall be bound by all of the terms, conditions, prices discounts and rates set forth herein, notwithstanding the expiration of the initial term of this Contract, or any extension thereof. Further, the terms, conditions, and warranties contained in this Contract that by their sense in context are intended to survive this completion of the performance, cancellation or termination of this Contract, shall so survive.

**14. Save Harmless/Indemnification**

Contractor shall protect, indemnify and save the City harmless from and against any damage, cost, or liability, including reasonable attorneys’ fees, resulting from claims for any or all injuries to persons or damage to property arising from intentional, willful or negligent acts or omissions of Contractor, its officers, employees, agents, or Subcontractors. The City will not indemnify the contractor and is prohibited from doing so.

**15. Severability**

If any term or condition of this Contract or the application thereof to any person(s) or circumstances is held invalid, such invalidity shall not affect other terms, conditions, or applications which can be given effect without the invalid term, condition, or application; to this end the terms and conditions for the Contract are declared severable.

**16. Assignment**

This Contract may not be assigned or otherwise transferred to others by the Contractor without the prior written consent of the City. If this Contract is so assigned, it shall inure to the benefit of and be binding upon any respective successors and assigns (including successive, as well as immediate, successors and assignees) of the Contractor.

**17. Authority to Bind**

The signatories to this Contract represent that they have the authority to bind themselves and their respective organizations to this Contract.

**18. Worker’s Compensation**

The Contractor shall comply with all Workers’ Compensation laws of the State of Ohio. **Proof of coverage shall be attached to this Contract AS EXHIBIT B.**

**19. Insurance**

Contractor shall carry at least the minimum amounts listed below of Commercial Liability Insurance (Bodily Injury and Property Damage) naming the City as an additional insured. **Contractor must attach a copy of the Certificate of Insurance to this Contract AS EXHIBIT C:**

**Bodily Injury Liability:**

Each Person               \$500,000  
Each Accident            \$1,000,000

**Property Damage Liability:**

Each Accident            \$500,000  
All Accidents             \$1,000,000

**20. Campaign Contributions**

Contractor hereby certifies the following: that it is familiar with Ohio Revised Code (“O.R.C.”) Section 3517.13; that it is in full compliance with Divisions (I) and (J) of that Section; that it is eligible for this contract under the law and will remain in compliance with O.R.C. Section 3517.13 for the duration of this contract and for one year thereafter.

**21. City Income Taxes**

Contractor hereby further agrees to withhold and pay all city income taxes due or payable under the provisions of Chapter 362, Columbus City Codes, for wages, salaries and commissions paid to its employees and further agrees that any of its subcontractors shall be required to agree to withhold and pay any such city income taxes due under said chapter for services performed under this Contract. If it has been determined by the Columbus Income Tax Division that Contractor, or any of its subcontractors, owes city income taxes, the Contractor agrees that the City may withhold the amount due to the City from any amount due to the Contractor for services performed under this Contract notwithstanding paragraph 9 hereinabove.

IN WITNESS WHEREOF, the parties have executed this Contract as of the day and year written below.

**EXHIBITS A, B AND C MUST BE ATTACHED HERETO.**

**\*ANY ALTERATIONS OF CONTRACT LANGUAGE WILL RESULT IN REVOCATION OF CITY ATTORNEY APPROVAL.\***

**CITY OF COLUMBUS**

DocuSigned by:

*MWR by Anita Clark*

5631545E188F46E

Mysheika W. Roberts, MD, MPH  
Health Commissioner, Columbus Public Health  
Federal Tax ID Number: 316400223

**BOARD OF HEALTH**

DocuSigned by:

*Andrew E. Boy*

5/2/2024

B300FD37AF1447B...

Board of Health Date

**CONTRACTOR**

*[Signature]* 5/1/24

Signature

Date

*SAPNA WELSH PARTNER*

Printed Name and Title

Federal ID Number: 16-1782139

Please list remit address below:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SAT solution consists of:

- o 1:1 EI report debrief/coaching – remote
- o 2-3 hour in person EI session/2 facilitators
  - § Tailored to SAT as a functional leadership team
  - § Fieldwork
- o 1-hour group coaching /2 facilitators
  - § To be delivered 3-4 weeks after in-person session

Level 1-4 solution consists of:

- o 1-hour EI report debrief by cohort – remote/2 facilitators
- o 3-hour in person EI session/2 facilitators
  - § Fieldwork
- o 1-hour group coaching by cohort/2 facilitators
  - § To be delivered 3-4 weeks after in-person session

LHR will administer EI assessments

Each in person and remote session will have between 18 and 25 participants

- o based on 143 participants SAT and Level 1-4 managers of people, 7 sessions are recommended
  - o programs will be organized by level (SAT, manager, employees)
- participants will remain in the same cohort for all interactions/sessions

evaluations will be collected for all in person sessions

progress surveys will be collected and reported from coaching sessions

an annual calendar will be created and evaluated quarterly for changes

we prefer zoom for remote sessions but can use teams, other platforms

Finalize scope and planning; Content development for levels 1-4 and post session group coaching; Service reviews; Administration	<b>\$ 7,525.00</b>
Finalize scope and planning; Content development for SAT with post session group coaching; Service reviews; Administration	<b>\$ 7,525.00</b>
Deploy in person training and remote coaching for up to 25 participants	<b>\$ 6,825.00 * 7 = 47,775</b>
<b>TOTAL</b>	<b>\$ 62,825.00</b>



LEVERAGE

# **EMOTIONAL INTELLIGENCE TRAINING SERVICES RESPONSE FOR RFQ026730 - COLUMBUS PUBLIC HEALTH**

February 14, 2024

614 219 9767

[info@leveragehr.com](mailto:info@leveragehr.com)

[leveragehr.com](http://leveragehr.com)

[linkedin.com/company/leverage-HR](https://www.linkedin.com/company/leverage-HR)

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### 3.1.3.1. BIDDER EXPERIENCE

**History:** Founded in December 2006 by three women, Leverage HR has grown to a partner with partner to Cities, Counties and State Level clients. At Leverage HR, we believe leaders on the road to “1% more” can discover their best selves and the best leaders create the kinds of cultures where everyone can grow. The firm is dedicated to developing leaders and crafting cultures through a personal approach helping each leader maximize their voice and culture impact and tailor initiatives that galvanize organizations to address big challenges.

**Our services include:**

- Leadership Development (development programs, workshops, retreats, presentations);
- Professional Coaching (individual, team, transition);
- Diversity & Inclusion (DEI strategy; targeted development, workshops & training to foster connected and inclusive cultures of belonging);
- Organizational Effectiveness (HR strategy; process management, change management)

**We are a values-driven organization, where we:**

- Start with you
- Tailor to your organization and culture
- Measure impact by increments of change

Following is a shortlist of some of the public sector clients Leverage HR has served.

<i>Municipalities</i>	<i>Counties</i>	<i>Energy</i>
City of Dublin	Columbus Zoo & Aquarium	American Municipal Power
City of Greeley	Franklin County Auditor’s Office	Philadelphia Gas Works
City of Hilliard	Franklin County Engineer’s Office	Westerville Electric
City of Columbus		
City of Westerville		
City of Upper Arlington	Orange County Employees Retirement System	

**Qualifications:** Firm Partners Sapna and Bob Welsh have together coached over 500 leaders and delivered leadership programs to over 3000 leaders. Bob has led culture and change projects for organizations ranging from 500,000 employees in 220 countries to 420 employees in one city. The firm is currently implementing employee development programs in 4 states. Supported by a team of ~10 consultants with over 20 years each in coaching, training, DEI and culture change, Leverage HR has proven again and again the ability to deliver world class solutions with impact to its clients.

**Competence:** the team is highly credentialed and certified. Our coaches and trainers hold credentialing from ICF and WABC and are certified in 10+ assessment tools. Our DEI experts hold certifications from Our Culture & Change practitioners are ProSci certified and currently completing the global CCMP certification – a designation held by less than 1300 individuals globally due to rigorous requirement proving experience and validation through ISO level testing.



**Demonstrated performance:** We measure performance for every activity we undertake. LHR will work with the client to develop KPI's to measure the effectiveness of the leadership development solution and define reporting that meets their needs. Below are some highlights of our consolidated reporting:

*Program Level Metrics:*

On average, our training programs, remote and in-person, receive 8.3+ on a 10-point scale.

- With our public sector clients alone, we have a 92% renewal rate on work.

*Client Level Metrics:*

- Client testimonials about the impact Leverage HR's programs

Leverage HR commonly uses the following performance-based criteria with clients:

- Post program evaluation
- Short questionnaires evaluating instructor's knowledge and approach, content of course, and facilities.
- We evaluate in these separate ways so we can identify where specific issues are if they arise.
- We typically use a 10-point scale.

**Overall approach to providing HR Services:** We deliver based on our values by meeting clients where they are, helping them clarify issues and opportunities, create tailored solution, and measure progress/impact. These solutions are informed by the latest research, developed to fully engage clients, and are led following strong project management practices.

**Unique and innovative aspects of service delivery:** We are truly diverse by design. We integrate diverse personal experience and professional insights across various municipalities and counties as well as private sector to offer tailored and innovative solutions that galvanize organizations to address culture building opportunities.



**Commitment to our Field:** Leverage HR is committed to the work we do in this space, as shown by the many accomplishments we have celebrated over the years.

*Awards*

- Inc. Magazine, Best in Business in the category for Coaching & Career Development (2023)
- Enterprising Women, Enterprising Woman of the Year Award (2023)
- Manage HR recognized as a 'Top 20 Diversity and Inclusion Companies' (2022)
- Columbus Business First awarded 'Outstanding Diversity Champion' (2022)
- Diversity/Career in Engineering & IT "for leading DEI work at Bank One" (9/2002)

*Conference Highlights*

Firm Partners and consultants have spoken on DEI and leadership trends in conferences across many nations over the years.

US Venues



- OSU, Working MBA Commencement Speaker, 8/23
- OSU, MHR Lecturer: Foundations of International HR, 9/23
- Florida Municipal Electric Association, Presenter: Talent Trends in Public Power, 04/23
- PMI, Development Conference, Track Presenters: Diversity in Project Management 10/22
- HCI National Conference (Joint Action Agencies), Presenter: Fund the People: Talent Strategies 9/22
- Latina Mentoring Academy Panelist: 6/22
- Diverse Networks, Panelist: Career Management and Emotions 5/22
- Whalen Annual Members Conference, Keynote: Fund the People: HCM and Strategy 12/21
- TEDx Southlake Salon, Facilitator: Driving Social Change (w/ 4 US/South Asian Executives) 10/21
- DHL / WISC (Women in Supply Chain Conference), Keynote: Mentorship, Sponsorship, Allyship 5/21
- Financial Times / Headspring, Facilitator: Retaining and Supporting Women in the Midst of Covid's Impact 4/21
- National AACE Conference, Facilitator: Management Track 10/20

#### International Venues

- Bank of America, Key Note: Courageous Leadership, APAC 8/22
- AIG, Keynote: Harnessing Your Personal Power, Japan 11/21
- TEDx, Presenter: Worldly Women, Bonn, Germany, 6/14
- HR360 - HR Innovations Tour, Keynote Presenter, Connecting Business and HR Strategy, Vienna, Austria, 06/12

#### *Publications*

##### Books

##### Women Leaders: The Power of Working Abroad

Washington, D.C.: Business Expert Press, 2019. Welsh, Sapna and Kersten, Caroline.

##### Worldly Women – The New Leadership Profile: How to Expatriate with Excellence

Washington, D.C.: iUniverse, 2013. Welsh, Sapna and Kersten, Caroline

- The research in these books continues to be some of the most comprehensive research completed on how to leverage international assignments to accelerate leadership development for women.
- Worldly Women received the Get Abstract book of the month award

Additional Research, Publications, Podcasts are available on our website.



As a demonstration of our experience in leadership development through integrated training and coaching, we have included a case study of a recent Leverage HR solution.



"Leverage HR, a proficient and organized team, played a pivotal role in addressing workforce gaps within our organization. Their approach involved providing one-on-one coaching sessions for supervisors led by highly skilled professionals and administering Strengthsfinder training to staff.

Known for their professionalism and preparedness, Leverage HR consistently delivers high-quality products. They are attentive to our needs, often exceeding expectations, and are proactive in offering suggestions and utilizing problem-solving techniques to creatively find solutions.

Testimonials from staff highlight the significant impact of Leverage HR, with comments such as "Best decision/ investment we ever made" and appreciation for their professionalism and effective approach in meeting our needs."

## CASE STUDY

# CULTIVATING STRENGTH

## A Case Study on Building a Thriving Culture and Empowering Leadership in a Department of Public Health

In response to the evolving needs and challenges within the public health sector, a dedicated initiative was undertaken to transform the culture of a Department of Public Health. Focused on fostering a strengths-based approach, the program aimed to create resilient teams and provide leadership coaching to enhance overall effectiveness.

The Department of Public Health recognized the necessity for a cultural shift to better meet the demands of a rapidly changing healthcare landscape. They partnered with Leverage HR to develop a tailored and phased approach to leverage the strengths of individuals, teams, and leadership to enhance collaboration, innovation, and ultimately, the delivery of public health services.

### APPROACH

#### Strengths-Based Culture Integration:

- Client completed Clifton StrengthsFinder assessment
- Conducted a series of workshops to introduce the concept of strengths and facilitated team discussions on incorporating strengths into everyday work.
- Established a system for ongoing strengths-based feedback and recognition to reinforce positive behaviors.

#### Strengths-Based Teams Formation:

- Conducted team-building workshops to identify team strengths, align individual roles with strengths, and enhance collaboration.
- Encouraged team members to share their strengths openly, fostering a sense of appreciation and mutual support.

#### Leadership Coaching Program:

- Coached cohorts of leaders on applying strengths-based principles in decision-making, conflict resolution, and team development.
- Facilitated team coaching sessions for each cohort on dominant themes from 1:1 coaching.

### RESULTS

The initiative resulted in a notable transformation of the department's culture. Key outcomes included:

- Strengths sessions and workshops received high ratings
- Teams demonstrated improved collaboration, leveraging each member's strengths to achieve common goals and in some cases identified areas to target to improve.
- Leaders exhibited a more profound understanding of their strengths and those of their team members, leading to more collaborative leadership.

[info@leveragehr.com](mailto:info@leveragehr.com)

[leveragehr.com](http://leveragehr.com)

[linkedin.com/company/leverage-hr](https://www.linkedin.com/company/leverage-hr)



### 3.1.3.2. BIDDER REFERENCES

Leverage HR has enjoyed working with Columbus Public Health and has received very positive feedback on progress with leadership coaching and training efforts. Listed below are three references from clients to whom we have delivered Leadership Development programs.

<b>Reference:</b> City of Westerville – OH <b>Contact:</b> Richard Lorenz, Water Utility Manager Contact info available upon request	<b>Category:</b> Leadership Development <b>Engagement date:</b> Currently under delivery
<p><i>Leverage HR provided the City of Westerville executive team with a dynamic leadership development program that encompassed a mix of thought-provoking informational presentations, participant interaction opportunities and exercises teaming with fellow department heads in a safe learning environment. As a utility manager, I often find myself caught up in the technical aspects of running the utility. This program provided a refocus on my most important function, that of managing our human resources and providing leadership to the organization.</i></p> <p><b>Scope of Work</b>          The award-winning City of Westerville leadership team looked to “reimagine” their leadership program with the retirement of their 30+ year, DC based partner. The objectives stated were to establish a new leadership program that would bring the vision, mission and values to life, provide leaders with the soft and technical skills to lead teams, build comradery among peer groups, reinforce life-long learning, and define a multi-year program to build future city leaders.</p> <p>In response to the Pandemic and pursuant challenges, we pivoted delivery from in-person to virtual. Additionally, we integrated specific content targeting the challenges the City faced. Examples include: Resiliency, Engaging Remote Teams, and Crisis Management. The classroom portion of this custom design covers the following topics:</p> <p><b>Connecting with the Big Picture</b></p> <ul style="list-style-type: none"> <li>• How well are we living the values?</li> <li>• Impact of where we are strong and less strong</li> </ul> <p><b>My Leadership Style</b></p> <ul style="list-style-type: none"> <li>• Values assessment and alignment to City Values</li> <li>• Kouzes and Posner’s Leadership Model</li> <li>• Leadership Journey</li> </ul> <p><b>Leadership Skill Building</b></p> <ul style="list-style-type: none"> <li>• Team Dynamics</li> <li>• Trust and Performance</li> <li>• EQ Master Class</li> <li>• Habit forming and Growth Mindset</li> </ul> <p><b>Fieldwork and Summaries</b></p> <ul style="list-style-type: none"> <li>• Leadership Study Summary presentations</li> <li>• Master Class: Motivating Others</li> </ul> <p><b>Capstone Class</b></p> <ul style="list-style-type: none"> <li>• Capstone delivery</li> <li>• Inspire, Engage, Empower</li> <li>• My Leadership Journey</li> <li>• Developing others</li> </ul>	



The four remote sessions leverage Mentimeter and Zoom to reinforce learning through blogging and peer coaching and discussion.

**The following quality metrics were captured and reported:**

- Course evaluation: 8.5 / 10.0 scale

**Reference:** Orange County Employment Retirement Services (OCERS)

**Contact:** Brenda Shott, Assistant CEO, Finance and Internal Operations, 714-558-6201, bschott@ocers.org

**Category:** Executive Team Coaching and Leadership

**Engagement Date:** Currently delivering

*My experience working with Leverage HR and Bob as my executive coach over the past several months has been exceptional. I appreciate that he has been available, responsive, and attentive to my leadership development as well as designing and executing effective team sessions. Bob is very knowledgeable in his field and has great interpersonal skills, the combination of the two are a great foundation for being a great executive coach. I look forward to our one-on-one coaching sessions because I consistently walk away fueled with new applicable tools or strategies to improve my leadership skills as well as with a renewed energy to execute my development plan. In just six months, I have already taken great strides in improving my effectiveness as a leader and our executive team has implemented strategies that have created notable improvements in how we approach projects. I highly recommend the LHR team to organizations that are looking to invest in their team's leadership development and building highly functional leadership teams.*

**Scope of Work:**

A team of 1 Partner and 5 consultants delivered one on one executive coaching for the CEO and his directs. In addition, they are leading a series of day long team coaching events that are customized to address the needs we identified during pre-interviews with LHR. For the individual coaching, we completed a survey on what we were looking for in a coach and were provided a shortlist of matching coaches to select from. Following selection, a kick-off call was held and each coach worked with the executive to identify individual to collect "high impact 360" feedback from. The coaches spoke with these individuals and consolidated the feedback into a report that was used to inform coaching priorities. LHR is currently engaged for 12 one-hour individual coaching sessions. In addition, each executive completed a DISC assessment and spoke with Bob to outline where strengths and opportunities existed on the executive team. Based on these inputs we have attended two all day team coaching sessions led by Bob.

**Reference:** Ann Law

**Contact:** Deloitte Advisory Senior Manager | Federal Practice [annlaw@deloitte.com](mailto:annlaw@deloitte.com), 703-201-6736

**Category:** Executive Coaching & Leadership Development

**Engagement Date:** 2021-2022

*Leverage HR was an integral part of the Winning New Business program which focused on developing leadership skills for women at the Senior Manager level at Deloitte. Sapna served as my facilitator and coach, and provided invaluable insights such as sharing her experiences and experiences of others she had coached - which shown me that I am not alone. She showed strong empathy and support, working with me through challenges I have faced throughout the program during our 1:1 coaching sessions. For example, as I was preparing my value proposition pitch, I valued Sapna's advice on how to communicate my professional brand and how to articulate my strengths and value that helped me deliver my message with a strong intent. Sapna's ability to deliver feedback in an objective yet warm demeanor, gets the message across without imparting*



*judgement or criticism. Sapna also coached me on applying emotional intelligence on understanding, feeling, responding, and overcoming an obstacle that would lend to my success with a client. She was able to help me dissect a challenge and see the possibilities/opportunities that this challenge brings – the opportunities in the marketplace to continue building my business and brand. Her coaching has made this program an extremely positive experience and definitely helped me grow as a leader.*

**Scope of Work:**

Sapna along with a team delivered training and coaching to prepare our group to be well prepared for next level leadership. They leveraged their knowledge of our business and combined it with their development, delivery, and coaching expertise to offer a robust leadership development program that met each participant where they were. The development program lasted 6 months. The program integrated 1:1 coaching, small group coaching, workshops, and exposure to organizational leadership to hear firsthand the experiences of company leaders in overcoming challenges and building marketplace presence. The program commenced with each of us taking the time to customize our individual success plan.

**For additional references for Firm Partners, please see their recommendations on LinkedIn available in the coach bios.**

Sapna Welsh: <https://www.linkedin.com/in/sapnawelsh/>

Bob Welsh: <https://www.linkedin.com/in/welshhr/>



### 3.1.3.3. BIDDER APPROACH, PROCESS, TIMELINE AND PROJECT TEAM

#### APPROACH

##### Leadership Development Philosophy

We follow a robust and standard approach to partner with organizations to create custom leadership training. Our Discovery, Align, Create and Launch approach ensures quality outcomes across the lifecycle of the engagement, clear check points along the way to enable refinement of messaging and content, and clear expectations for customers at each phase. Following is a workplan to deliver the specified training programs and workshops.

##### Leadership Development Framework

We are leadership development experts who have a growing public sector practice currently serving various state & local governments. We customize the content and tools we use for each client. Whether we facilitate in person or remote, we have proven our ability to connect from front line to executives. We address learning through a leadership framework based on Head (knowledge), Hand (practice and tools) and Heart (emotional). Below is a graph highlighting how we accomplish this through various tactics.

Focus Area	Description	Tactics
<b>Head</b>	We understand that leaders need information and data to appreciate how and why certain things are important.	Imparting knowledge and facts through: -Lecture, articles, videos
<b>Hand</b>	Leaders also require hands on practice to build the muscle and skill required to bring any leadership concept to life.	Practicing new skills through: -Exercises, Case Studies, Field Work
<b>Heart</b>	But none of this will matter if they don't change anything back on the job - so we focus on growing commitment.	Grow commitment to change back on the job through: -Videos, Testimonials, Stand & Deliver, Follow Up

<b>Standards and approaches we use to address learning styles include:</b>	<ul style="list-style-type: none"> <li>• Merrill's principles of instruction to incorporate head (knowledge), hands (application), heart (commitment) into our sessions</li> <li>• Leveraging audio, video, exercises; presentation and reflection into exercises</li> <li>• Connecting in class lessons to outside of classroom interaction and field work</li> </ul>
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	<ul style="list-style-type: none"> <li>• Framing learning within the 70-20-10 model to connect learning with impact</li> <li>• Leveraging the approaches listed in response to the previous questions</li> </ul>
<p><b>Facilitation approaches that incorporate technology to elevate engagement and increase retention</b></p>	<p>As experienced global trainers we have had to deliver programs from the board rooms in the US to a dirt floor conference room in Brazil. We are agile and leverage whatever capabilities are available for training. We are highly skilled and experienced in both in person and virtual training and regularly blend these solutions to create a rich, engaging, and impactful learning experience. Below are some examples of how we use them as standalone and integrated solutions. The Leverage HR team integrates technology, standards, and philosophy to enable a “frictionless” and robust outcome for clients.</p> <ul style="list-style-type: none"> <li>• <b>Zoom / Google Meets / MS Teams / Skype:</b> we use this regularly to conduct training, coaching and meetings. We will use different technologies based on the design need (e.g., creating breakout rooms) and the clients preferred platforms.</li> <li>• <b>Google Hangouts / Zoom:</b> for our custom content we utilize Google Hangouts to video link in experts from our global network of professional leaders to present topics of interest. We project the video in class for all participants to see.</li> <li>• <b>Organizational learning solutions:</b> we often leverage training that exists within the organization (Lynda.com, LinkedIn learning, Skillsoft, etc.) to create hybrid solutions enabling us to keep the “training” components outside of in person time so that we can focus on “learning and development.”</li> <li>• <b>Padlet:</b> we often use this platform as part of our programmatic solutions to enable pre or between classroom reading, blogging and voting, all of which helps keep participants engaged beyond the classroom.</li> <li>• <b>MentiMeter:</b> we use this tool in classroom and remote training sessions to gather information via individuals’ smartphones / laptops and summarize their responses into graphs, word clouds and other forms to consolidate insights.</li> <li>• <b>SurveyMonkey:</b> used to collect course evaluations and other information exchanges aimed at improving the learning delivery and measuring the organizational impact.</li> <li>• <b>Various video editors:</b> for our custom content we create and infuse video snippets to summarize complex topics and bring the voice to customers, colleagues and experts into the room.</li> </ul>
<p><b>A diversity &amp; inclusion, lens to increase coaching efficacy</b></p>	<p>Our experience working with global clients and across all levels of organizations, we have developed depth in interacting across diverse teams including age differences, varied education and experience levels, various cultural norms, and various individual styles. Some of these include:</p> <ul style="list-style-type: none"> <li>• Utilizing uncomplicated language to describe content and provide instruction;</li> </ul>



	<ul style="list-style-type: none"> <li>• Balancing the voices and opinions in the room by pulling others into discussions;</li> <li>• Mixing teams in various and larger / smaller teams to provide more “airtime” to everyone;</li> <li>• Including principles such as respect, active listening, etc. in the upfront class contracting;</li> <li>• Managing disrespectful behavior – intentional or otherwise – in a respectful and private manner;</li> <li>• Honoring and pulling out learnings from examples that are not based on work experience; and</li> <li>• Utilizing examples that reflect varied experiences and pulling such examples from participants.</li> </ul>
<p><b>Committed to create engaging and interactive learning experiences</b></p>	<p>Tactics we use include:</p> <ul style="list-style-type: none"> <li>• Robust preparation with a focus on timing, clear instruction, and identifying key learning points;</li> <li>• Matching facilitation approach to the content using Heron’s three styles of facilitation</li> <li>• Monitoring attendee energy levels and adjusting style and / or breaks;</li> <li>• Leveraging a mix of questions, exercises, individual reading /reflection throughout the program;</li> <li>• Mixing participants in table exercises and “getting people out of their seats” for team exercises;</li> </ul> <p>In our own designs we leverage crisp slides, videos, music, in booklet assessments / tools and leveraging individual, peer and group break out and present back approaches.</p>
<p><b>Committed to create optimum learning environments</b></p>	<p>Approaches we use include:</p> <ul style="list-style-type: none"> <li>• Adjust seating, when possible, based on the type of learning</li> <li>• Pre-staging activities, handouts, and QA of audio video to minimize distractions</li> <li>• Leveraging introductions and ice breakers to increase trust among participants</li> <li>• Structured contracting with participants at the outset on how we agree to work</li> <li>• Reminders about the tenants of a growth mindset to optimize learning</li> <li>• Organization of flip charts, etc. throughout the day to enable a quick review of the days flow.</li> <li>• Managing any unforeseen issues effectively (power outage, nearby noise, etc.)</li> </ul> <p>Leveraging the practices listed above to ensure engagement and learning</p>



## PROCESS

<p><b>Clearly established communication, feedback, and reporting processes</b></p>	<p>Leverage HR assigns an engagement lead to each customer who partners with them to ensure the highest quality and impact across each stage of a solution. Below please find a description of how we work to ensure flawless deployment of coaching services.</p> <p><u>Set up and Planning</u></p> <ul style="list-style-type: none"> <li>• Partnership with HRD is critical for this process to work. If selected, we will invest the time to align expectations and operating approaches based on best practices and client needs. This will include regular service reviews to evaluate the performance of services.</li> <li>• Clarity on connection to HR processes (Performance Management, Development Planning, Succession Planning) and internal marketing and communication</li> <li>• Testing of technology platforms (scheduling, remote coaching, online assessments) with customers IT department</li> </ul> <p><u>Program Management</u></p> <ul style="list-style-type: none"> <li>• As needed interventions (24 – 48 hour response to any questions / concerns / needs raised by the customer)</li> <li>• Monthly reporting (utilization, other details as requested)</li> <li>• Quarterly check ins (discussions on what is working well and where opportunities exist for improvement)</li> </ul> <p>Annual Program review (consolidated reporting and alignment on approach for the following year)</p>
<p><b>Drafted program objectives</b></p>	<ul style="list-style-type: none"> <li>• Develop insight and skills to reinforce an agile organization</li> <li>• Build employee engagement and development skills</li> <li>• Enhance personal leadership impact</li> <li>• Deepen leadership and organizational connections</li> <li>• Establish foundations for continuous learning</li> </ul>

## TIMELINE

### Finalize scope and planning (first 30 days)

- define number of overall participants / sessions for SAT, manager, employees
- define deployment approach with CPH sponsor
- finalize numbers, dates, and secure training rooms
- define registration process with CPH sponsor
- select and book LHR instructors based on calendar dates/ availability



### Content development (next 30 days)

- finalize training objectives with CPH sponsor
- select preferred EI assessment and test links with CPH IT / IS
- test video (for remote) and program evaluation links with CPH IT / IS
- create detailed design including exercises, debriefs, key points and flow
- develop custom slides, participant guides and field support tools
- craft flyer to introduce program
- launch communication and registration process
- align participant evaluation process and scorecard with CPH sponsor

### Deploy in person Training / SAT, Manager, Employee (per each session)

- implement aligned registration process
- send EQ assessment to participants
- send site set up checklist to CPH contact to prepare room
- review assessment completion and send reminders
- send any print material to CPH one week prior to course to print copies
- deliver program and collect participant evaluations
- consolidate session evaluations
- evaluate feedback and make any adjustment to program as needed
- consolidate feedback and send to CPH sponsor

### Deployment of remote coaching sessions (45 days after in person session)

- send brief survey to gather input on focus areas for coaching
- implement group coaching session for each cohort
- send post program survey to confidentially collect progress and impact data
- consolidate feedback and send to CPH sponsor

### Service Review (quarterly/ annually)

- send evaluation summaries to CPH sponsor after each session
- quarterly service review with CPH sponsor to review participation, evaluations, any adjustments, and review deployment plans
- year-end service review with CPH sponsor to review year and plan for any follow up / reinforcement activities

### In person session (drafted high level design approach)

- Welcome and Introductions



- Why Emotional Intelligence is important to strong leadership and building strong cultures
- Reading my report (walk through of the individual reports)
- Reflection and Discussions (in peers)
- Developing my EI (strategies)

#### *Sample EI workshop from prior delivery*

- The participants are engaged immediately in how they feel and why they feel what they feel. To get them present but also set the foundation for vulnerability and self-awareness based on mental, emotional and physical awareness of self.
- They go into a breakout activity where they have to choose to answer one of 6 questions ranging from easy (what is a happy moment from this year) to hard (what evokes fear in you). Each question can only be answered once so it's a forcing exercise.
- Review what EI is (Daniel Goleman), what people with high EI look like – group exercise to identify traits.
- Focus on the Emotional and Social Intelligence Model overview and review personal scores. This would cover self-awareness and self-regulation, empathy and social skills, motivation and resilience and effective communication.
- Spend time reflecting on the report/scores. Group exercise to understand their strengths and weaknesses and how this manifests in team output
- Review the science behind EI, amygdala hijack. Group activity to help participants understand what triggers them (pre-work)
- Exercise in breakouts - Choose a situation which is triggering (has happened is happening or is coming up) and practice preparing for that using EI by visualization and prep through self-awareness and social and organizational awareness, and self-management. Practice in breakouts and share solutions and feedback.
- Devise an action plan to make this stick.

## PROJECT TEAM

[Our team](#) consists of 25+ consultants and coaches, each with deep experience in preparing talent in organizations to be more impactful leaders, and all available to support the work if our firm is selected. Our team's experience in house and as consultants has provided us unparalleled experience – from leading Strategy, Talent, Learning, OD and HR systems for Fortune 500 and Global 100 business, to working in over 15 countries to deliver leadership development, executive coaching, and DEI solutions.



- **Experienced Trainers:** we have delivered leadership training to over 8K participants from front line to board levels. Notably, among the team we propose to City of Hilliard, we have multiple consultants with experience in healthcare including former heads of talent for healthcare and pharma organizations and retired physician consultants.
- **Experienced Coaches:** we maintain coaching credentials at the highest levels and have delivered over 3K hours of coaching to leaders and teams.
- **Real World Work / Leadership Experience:** On average our team has 20+ year work experience, 15+ years leading from frontline to top executive levels positions.
- **Thought Leaders:** With two books, dozens and other publications and regular speakers at conferences, we have established ourselves as thought leaders in our domain areas.
- **Global Perspective / Reach:** Our team is diverse by design. They have delivered in over 10 countries including US, Canada, Brazil, Argentina, Mexico, UK, the Netherlands, Belgium, Germany, France, Switzerland, Singapore, and India. Our extended faculty can deliver across the Americas, Europe, and parts of APAC.
- **Strategy and Transformation Competence:** We have a core competency in leading the development, translation and implementation of strategy having led Organizational / HR strategy and translating it into leadership, OD, and HR solutions to enable organizations to realize it through their people. In addition, we have led change management teams (up to 20) and delivered change management for organizations in the Americas and Europe.
- **Experienced Communicators:** Combining our experience presenting to all levels, from front line employees to boards, in several countries, we understand communication at a truly global level.
- **Experienced in the content listed:** Our facilitators have delivered all the topics highlighted and, in many cases, have led the design, development and delivery of these content areas for organizations content. Here is a sample of [bios](#) for the proposed engagement team.

LHR Partner **Sapna Welsh** will serve as the primary contact for the overall solution and Christa Lyons, will serve as the project manager, working directly with the coaches, the key client stakeholders and sponsors.





	15-20 years experience	Public Sector/Non-Profit Client experience	Certified Executive Coach / EI Experience	Training and Facilitation expertise
Sapna Welsh	X	X	X	X
Bob Welsh	X	X	X	X
Susan Alexander	X	X	X	X
Kim Andrade	X	X	X	X
Jeff Bell	X	X	X	
Rhonda Bernard	X	X	X	X
Uma Devireddy	X	X	X	X
Jennifer Hanson	X	X	X	X
Pamela Hardy	X	X	X	X
Christa Lyons	X	X	X	X
Peggy Marshall	X	X	X	X
John Maxwell	X	X	X	X
Julie McManus	X		X	X
Bryan Miller	X	X	X	X
Shiv Paul	X	X	X	X
Camila Reis	X	X	X	
Terry Slayman	X	X	X	
Rea Waldon	X		X	X



### 3.1.3.4. COST, PRICING, AND STRUCTURE

#### PRICING

Pricing is based on assumptions, includes all steps in timeline, and includes T&E (e.g. EI assessments pp). If selected, we will partner with CPH to tailor our approach and adjust pricing accordingly. For example:

- Select an organization subscription to an EI assessment to possibly reduce cost. EI assessments range: \$200-\$500
- Develop one in-person training rather than three unique sessions based on audience of SAT, Managers, or Employees
- Adjust number of participants per session

Finalize scope and planning; Content development for levels 1-4 and post session group coaching; Service reviews; Administration	\$ 7,525.00
Finalize scope and planning; Content development for SAT with post session group coaching; Service reviews; Administration	\$ 7,525.00
Deploy in person training and remote coaching for up to 25 participants	\$ 6,825.00 * 7 = 47,775
<b>TOTAL</b>	<b>\$ 62,825.00</b>

#### ASSUMPTIONS IN PROPOSED DESIGN/STRUCTURE

- programs will be organized by level (SAT, manager, employees)
- objectives and design vary based on level
- solution consists of a 4-hour in person and 1-hour remote coaching
- solution includes LHR administering EI assessments
- in person and remote coaching session are in groups
- each in person and remote session will have between 18 and 25 participants
- participants will remain in the same cohort for both sessions
- each in person session will be facilitated by two trainers
- evaluations will be collected for all in person sessions
- progress surveys will be collected and reported from coaching sessions
- an annual calendar will be created and evaluated quarterly for changes
- we prefer zoom for remote sessions but can use teams, other platforms

#### STRUCTURE

See details in timeline section. Detailed structure of rollout will be determined in partnership with client.



# APPENDIX

Vendor Number with City of Columbus #031215

**PROPOSAL**

To the Health Commissioner of the City of Columbus, Ohio:

We (I) propose to furnish the following article(s) and/or service(s) at the price(s) and terms stated subject to all instructions, conditions, specifications and all attachments hereto. We (I) have read all attachments including the specifications and fully understand what is required.

Payment Terms: 30 days

Company Name or Bidder's Name: Leverage HR

Business Address of Bidder: 1220 Sea Shell Dr. Columbus OH 43082

**REQUIRED Company Employee Information:**  
 Total number of company employees = 2  
 Total number of company employees working in Columbus = 2  
 Additional number of employees that will be working in Columbus in the event this contract is awarded to your company = 0

The full name and residence of all persons and parties interested in the foregoing bid are: (If a corporation, give the name and address of the president and secretary, if firm or partnership, the names and address of the members or partners.)

Name	Address
<u>Leverage HR</u>	<u>1220 Sea Shell Dr. Columbus OH 43082</u>
_____	_____
_____	_____

Authorized Signature: [Signature] Title: Partner  
(SIGNATURE MUST BE WRITTEN IN OTHER THAN BLACK INK) (TITLE MUST BE GIVEN)

**Affidavit**

**Non-Collusion Affidavit**  
 (This affidavit must be executed for the proposal to be considered)

State of Ohio  
 County Delaware

Sapna Welch, being first duly sworn deposes and says that the is, Partner, (sole owner, a partner, president, secretary, etc.) of the party making the foregoing proposal or bid; that such bid is genuine and not collusive or sham; that said bidder is not financially interested in, or otherwise affiliated in a business way with any other bidder on the same Contract; that said has not colluded, conspired, connived or agreed, directly or indirectly, with any bidder or person, to put in a sham bid, or that such other person shall refrain from bidding, and has not in any manner directly or indirectly, sought by agreement or collusion, or communication or conference, with any person, to fix the bid price of affiant or any other bidder or to secure any advantage against the City of Columbus, Ohio or any person or persons interested in the proposed Contract; and that all statements contained in said proposal or bid are true; and further, that such bidder has not directly or indirectly submitted this bid, or the contents thereof or divulged information or data relative thereto to any association or to any member or agent thereof.

[Signature]  
 Signature of Affiant

Sworn to and subscribed before me this 13 day of February, 2024.

Notary public in and for

ANDREW C SHANK  
 Notary Public  
 State of Ohio  
 My Comm. Expires  
 November 14, 2028

[Signature] (county) Franklin (state) Ohio  
 My commission expires: Nov 14 2028





**Bureau of Workers' Compensation**

30 W. Spring St.  
Columbus, OH 43215

### Certificate of Ohio Workers' Compensation

This certifies that the employer listed below participates in the Ohio State Insurance Fund as required by law. Therefore, the employer is entitled to the rights and benefits of the fund for the period specified. This certificate is only valid if premiums and assessments, including installments, are paid by the applicable due date. To verify coverage, visit [www.bwc.ohio.gov](http://www.bwc.ohio.gov), or call 1-800-644-6292.

This certificate must be conspicuously posted.

Policy number and employer  
80141448

Period Specified Below  
07/25/2023 to 07/01/2024

LEVERAGE HR, LLC  
1220 Sea Shell Dr  
Westerville OH 43082-7457



[www.bwc.ohio.gov](http://www.bwc.ohio.gov)  
Issued by: BWC

Administrator/CEO

You can reproduce this certificate as needed.

### Ohio Bureau of Workers' Compensation

#### Required Posting

Section 4123.54 of the Ohio Revised Code requires notice of rebuttable presumption. Rebuttable presumption means an employee may dispute or prove untrue the presumption (or belief) that alcohol, marihuana or a controlled substance not prescribed by the employee's physician is the proximate cause (main reason) of the work-related injury.

The burden of proof is on the employee to prove the presence of alcohol, marihuana or a controlled substance was not the proximate cause of the work-related injury. An employee who tests positive or refuses to submit to chemical testing may be disqualified for compensation and benefits under the Workers' Compensation Act.



**Bureau of Workers' Compensation**

You must post this language with the Certificate of Ohio Workers' Compensation.

