

# COUNTY OF ALBANY

## PROPOSAL FORM

### PROPOSAL IDENTIFICATION:

Title: Comprehensive Leadership Course  
RFP Number: 2024-129

### THIS PROPOSAL IS SUBMITTED TO:

Pamela O Neill, Purchasing Agent  
Albany County Department of General Services  
Purchasing Division  
112 State Street, Room 1000  
Albany, NY 12207

1. The undersigned Proposer proposes and agrees, if this Proposal is accepted, to enter into a Contract with the owner in the form included in the Contract Documents to complete all Work as specified or indicated in the Contract Documents for the Contract Price and within the Contract Time indicated in this Proposal and in accordance with the Contract Documents.
2. Proposer accepts all of the terms and conditions of the Instructions to Proposers, including without limitation those dealing with the Disposition of Proposal Security. This Proposal may remain open for ninety (90) days after the day of Proposal opening. Proposer will sign the Contract and submit the Contract Security and other documents required by the Contract Documents within fifteen days after the date of County's Notice of Award.
3. In submitting this Proposal, Proposer represents, as more fully set forth in this Contract, that:

- (a) Proposer has examined copies of all the Contract Documents and of the following addenda: (If none, so state)

Date	Number
03-Oct-24	RFP-2024-129
08-Oct-24	RFP-2024-129 Addendum #1
11-Oct-24	RFP-2024-129 Addendum #2
17-Oct-24	RFP-2024-129 Addendum #3

(receipt of all of which is hereby acknowledges) and also copies of the Notice to Proposers and the Instructions to Proposers;

- (b) Proposer has examined the site and locality where the Work is to be performed, the legal requirements (federal, state and local laws, ordinances, rules and regulations) and the conditions affecting cost, progress or performance of the Work and has made such independent investigations as Proposer deems necessary;





# COUNTY OF ALBANY

## COST PROPOSAL FORM

### PROPOSAL IDENTIFICATION:

Title: Comprehensive Leadership Course  
RFP Number: 2024-129

**COMPANY:**

Cora Group, Inc.

**ADDRESS:**

50 Lexington Avenue, #292

**CITY, STATE, ZIP:**

New York, New York 10010

**TEL. NO.:**

212-481-3661

**FAX NO.:**

n/a

**FEDERAL TAX ID NO.:**

134099444

**REPRESENTATIVE:**

Norma Tan

**E-MAIL:**

ntan@coragroupinc.com

**SIGNATURE AND TITLE**

*Norma Tan, PhD* Owner, Principal

**DATE**

24-Oct-24

ATTACHMENT #4: COUNTY OF ALBANY – NON - FEDERAL ENTITY CONTRACT PROVISIONS

The following provisions are required and apply when federal funds are expended by the County of Albany for any contract resulting from the RFB/P #2023-042 procurement process.

- (A) Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Pursuant to Federal contract provision (A) above, when federal funds are expended by the County of Albany, the County reserves all rights and privileges under the applicable laws and regulations with respect to the RFB/P # procurement in the event of breach of contract by either party.

**Does Contractor/Consultant agree? YES X      Authorized Representative's initials: NT**

- (B) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000).

Pursuant to Federal contract provision (B) above, when federal funds are expended by the County of Albany, the County reserves the right to immediately terminate any contract in excess of \$10,000 resulting from the RFB/P #2023-042 procurement process in the event of a breach or default of the agreement by Contractor/Consultant, in the event the Contractor/Consultant fails to:

- (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, agreement, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the agreement and/or the procurement solicitation. The County of Albany also reserves the right to terminate the contract immediately, with written notice to the Contractor/Consultant, for convenience, if the County believes, in its sole discretion that it is in the best interest of the County to do so. The Contractor/Consultant will be compensated for work performed and accepted and goods accepted by the County as of the termination date if the contract is terminated for convenience of the County. Any award under the RFB/P #2023-042 procurement process is not exclusive and the County reserves the right to purchase goods and services from other Contractors/Consultants when it is in the best interest of the County.

**Does Contractor/Consultant agree? YES X      Authorized Representative's initials: NT**



- (C) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”

Pursuant to Federal contract provision (C) above, when federal funds are expended by the County of Albany on any federally assisted construction contract, the aforesaid equal opportunity clause is incorporated by reference herein.

**Does Contractor/Consultant agree? YES X      Authorized Representative’s initials: NT**

- (D) Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146- 3148) as supplemented by Department of Labor regulations (29 CFR Part 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non- Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

Pursuant to Federal contract provision (D) above, when federal funds are expended by the County of Albany during the term of an award for all contracts and subgrants for construction or repair, the Contractor/Consultant shall comply with all applicable Davis-Bacon Act provisions.

**Does Contractor/Consultant agree? YES X      Authorized Representative's initials: NT**

- (E) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

Pursuant to Federal contract provision (E) above, when federal funds are expended by the County of Albany, the Contractor/Consultant certifies that during the term of an award for all contracts by the County resulting from the RFB/P # procurement process, the Contractor/Consultant shall be, and shall remain, in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

- (F) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

Pursuant to Federal contract provision (F) above, when federal funds are expended by the County of Albany, the Contractor/Consultant certifies that during the term of an award for all contracts by the County resulting from the RFB/P # procurement process, the Contractor/Consultant agrees to comply with all applicable requirements as referenced in Federal contract provision (F) above.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**



(G) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended. Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

Pursuant to Federal contract provision (G) above, when federal funds are expended by the County of Albany, the Contractor/Consultant certifies that during the term of an award for all contracts by the County resulting from the RFB/P #2023-042 procurement process, the Contractor/Consultant agrees to comply with all applicable requirements as referenced in Federal contract provision (G) above.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

(H) Debarment and Suspension (Executive Orders 12549 and 12689). A contract award (see 2 CFR 180.220) must not be made to parties listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Pursuant to Federal contract provision (H) above, when federal funds are expended by the County of Albany, the Contractor/Consultant certifies that during the term of an award for all contracts by the resulting from the RFB/P# procurement process, the Contractor/Consultant neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency or by the State of New York. The Contractor/Consultant shall immediately provide written notice to the if at any time it learns that this certification was erroneous when submitted or has become erroneous by reason of changed circumstances. The County may rely upon a certification of a Contractor/Consultant that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered contract, unless the County knows the certification is erroneous.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

- (I) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). Contractors/Consultants that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

Pursuant to Federal contract provision (I) above, when federal funds are expended by the County of Albany, the Contractor/Consultant certifies that during the term and after the awarded term of an award for all contracts by the County resulting from the RFB/P # procurement process, the Contractor/Consultant shall provide the required written certification that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The Contractor/Consultant further certifies that:

- (1) No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- (3) The Contractor/Consultant shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

The aforesaid certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of the required certificate is a prerequisite for making or entering into this transaction imposed by Section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**



(J) Procurement of Recovered Materials. When federal funds are expended by the County of Albany, it and its contractors/consultants must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include: (1) procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; (2) procuring solid waste management services in a manner that maximizes energy and resource recovery; and (3) establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Pursuant to Federal contract provision (J) above, when federal funds are expended the County of Albany, as required by the Resource Conservation and Recovery Act of 1976 (42 U.S.C. § 6962(c)(3)(A)(i)), the Contractor/Consultant certifies, by initialing this document, that the percentage of recovered materials content for EPA-designated items to be delivered or used in the performance of the agreement will be at least the amount required by the applicable contract specifications or other contractual requirements.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

(K) Required Affirmative Steps for Small, Minority, And Women-Owned Firms for Contracts Paid for with Federal Funds – 2 CFR § 200.321 – When federal funds are expended by the County of Albany, Contractor/Consultant is required to take all affirmative steps set forth in 2 CFR 200.321 to solicit and reach out to small, minority and women-owned firms for any subcontracting opportunities on the project, including: 1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists; 2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources; 3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises; 4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises; and 5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.

Pursuant to Federal contract provision (K) above, when federal funds are expended the County of Albany, the Contractor/Consultant certifies, by initialing this document, that it shall take all affirmative steps set forth in 2 CFR 200.321 to solicit and reach out to small, minority and women-owned firms for any subcontracting opportunities on the project.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

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RECORD RETENTION REQUIREMENTS FOR CONTRACTS PAID FOR WITH FEDERAL FUNDS – 2 CFR § 200.334

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When federal funds are expended by the County of Albany for any contract resulting from the RFB/P # procurement process, the Contractor/Consultant certifies it shall comply with the record retention requirements detailed in 2 CFR § 200.334. The Contractor/Consultant further certifies it will retain all records as required by 2 CFR § 200.334 for a period of three (3) years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

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CERTIFICATION OF COMPLIANCE WITH EPA REGULATIONS APPLICABLE TO GRANTS, SUBGRANTS, COOPERATIVE AGREEMENTS, AND CONTRACTS IN EXCESS OF \$100,000 OF FEDERAL FUNDS

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When federal funds are expended by the County of Albany for any contract resulting from the RFB/P # procurement process in excess of \$100,000, the vendor certifies that the vendor is in compliance with all applicable standards, orders, regulations, and/or requirements issued pursuant to the Clean Air Act of 1970, as amended (42 U.S.C. 1857(h)), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

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CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT

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When federal funds are expended by the County of Albany for any contract resulting from this procurement process, the Contractor/Consultant certifies it shall be in compliance with mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**



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CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS

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Contractor/Consultant certifies it shall be, and remain, in compliance with all applicable provisions of the Buy America Act. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**

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CERTIFICATION OF NON-COLLUSION STATEMENT

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Contractor/Consultant certifies that it has executed a certification under penalty of perjury as part of its response to the RFB/P #    procurement solicitation that it is in all respects bona fide, fair, and made without collusion or fraud with any person, joint venture, partnership, corporation or other business or legal entity.

**Does Contractor/Consultant certify? YES X      Authorized Representative's initials: NT**



**ATTACHMENT "A"**  
**NON-COLLUSIVE BIDDING CERTIFICATE PURSUANT TO**  
**SECTION 103-D OF THE NEW YORK STATE GENERAL MUNICIPAL LAW**

A. By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid, each party thereto certifies as to its own organizations, under penalty of perjury, that to the best of knowledge and belief:

(1) The prices in this bid have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor.

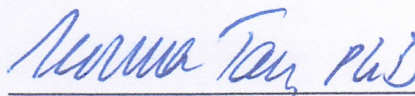
(2) Unless otherwise required by law, the prices which have been quoted in this bid have not knowingly been disclosed by the bidder and will not knowingly be disclosed by the bidder, directly or indirectly, prior to opening, to any bidder or to any competitor.

(3) No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition.

A bid shall not be considered for award nor shall any award be made where (1), (2), and (3) above have not been complied with; provided, however, that in any case the bidder cannot make the foregoing certification, the bidder shall so state and shall furnish with the bid a signed statement which sets forth in detail the reasons thereof. Where (1), (2), and (3) above have not been complied with, the bid shall not be considered for any award nor shall any award be made unless the head of the Purchasing Unit to the political subdivision, public department, agency or official thereof to which the bid is made, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

The fact that a bidder (a) has published price lists, rates, or tariffs covering items being procured, (b) has informed prospective customer of proposed or pending publication of new or revised price lists for such items, or (c) has sold the same items to other customers at the same prices being bid, does not constitute, without more, a disclosure within the meaning of paragraph "A" above.

B. Any bid hereafter made to any political subdivision of the state or any public department, agency or official thereof by a corporate bidder for work or services performed or to be performed or goods sold or to be sold, where competitive bidding is required by statute, rule, regulation, local law, and where such bid contains the certification referred to in paragraph "A" of this section, shall be deemed to have been authorized by the Board of Directors of the bidder, and such authorization shall be deemed to include the submission of the bid and the inclusion therein of the certificate as to non-collusion as the act and deed of the corporation



Signature

Norma Tan, Owner, Principal

Title

Cora Group, Inc.

Company Name

24-Oct-24

Date



**ATTACHMENT "B"**  
**ACKNOWLEDGMENT BY PROPOSER**

If Individual or Individuals:

STATE OF \_\_\_\_\_ )  
COUNTY OF \_\_\_\_\_ ) SS.:

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me personally appeared \_\_\_\_\_ to me known and known to me to be the same person(s) described in and who executed the within instrument, and he (or they severally) acknowledged to me that he (or they) executed the same.

\_\_\_\_\_  
Notary Public, State of \_\_\_\_\_

Qualified in \_\_\_\_\_

Commission Expires \_\_\_\_\_

If Corporation:

STATE OF NY )  
COUNTY OF Queens ) SS.:

On this 21 day of October, 2024, before me personally appeared Norma Tan to me known, who, being by me sworn, did say that he resides at (give address) 330 3rd Ave Apt 5F NY NY 10010; that he is the (give title) Owner / Principal of the (name of corporation) Cora Group Inc., the corporation described in and which executed the above instrument; that he knows the seal of the corporation, and that the seal affixed to the instrument is such corporate seal; that it was so affixed by order of the board of directors of the corporation, and that he signed his name thereto by like order.

**LISSETTE APOLO**  
Notary Public - State of New York  
No. 01AP6319820  
Qualified in Queens County  
My Commission Expires 02/23/2027

[Signature]  
Notary Public, State of NY

Qualified in Queens

Commission Expires 2/23/2027

If Partnership:

STATE OF \_\_\_\_\_ )  
COUNTY OF \_\_\_\_\_ ) SS.:

On the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me personally came \_\_\_\_\_ to me known to be the individual who executed the foregoing, and who, being duly sworn, did depose and say that he / she is a partner of the firm of \_\_\_\_\_ and that he / she has the authority to sign the same, and acknowledged that he / she executed the same as the act and deed of said partnership.

\_\_\_\_\_  
Notary Public, State of \_\_\_\_\_

Qualified in \_\_\_\_\_

Commission Expires \_\_\_\_\_



**ATTACHMENT "C"**  
**ALBANY COUNTY**  
**VENDOR RESPONSIBILITY QUESTIONNAIRE**

1. VENDOR IS: <input checked="" type="checkbox"/> PRIME CONTRACTOR			
2. VENDOR'S LEGAL BUSINESS NAME <b>Cora Group, Inc.</b>		3. IDENTIFICATION NUMBERS a) FEIN # <b>134099444</b> b) DUNS # <b>605485978</b>	
4. D/B/A – Doing Business As (if applicable) & COUNTY FIELD:		5. WEBSITE ADDRESS (if applicable) <b>www.coragroupinc.com</b>	
6. ADDRESS OF PRIMARY PLACE OF BUSINESS/EXECUTIVE OFFICE <b>50 Lexington Avenue, #292            New York, New York 10010</b>		7. TELEPHONE NUMBER <b>212-481-3661</b>	8. FAX NUMBER <b>n/a</b>
9. ADDRESS OF PRIMARY PLACE OF BUSINESS/EXECUTIVE OFFICE <i>IN NEW YORK STATE, if different from above</i>		10. TELEPHONE NUMBER	11. FAX NUMBER
12. AUTHORIZED CONTACT FOR THE QUESTIONNAIRE Name <b>Norma Tan</b> Title <b>Owner, Principal</b> Telephone Number <b>212-481-3661</b> Fax Number <b>n/a</b> e-mail <b>ntan@coragroupinc.com</b>			
13. LIST ALL OF THE VENDOR'S PRINCIPAL OWNERS.			
a) NAME <b>Norma Tan</b>	TITLE <b>Owner, Principal</b>	b) NAME	TITLE
c) NAME	TITLE	d) NAME	TITLE
A DETAILED EXPLANATION IS REQUIRED FOR EACH QUESTION ANSWERED WITH A "YES," AND MUST BE PROVIDED AS AN ATTACHMENT TO THE COMPLETED QUESTIONNAIRE. YOU MUST PROVIDE ADEQUATE DETAILS OR DOCUMENTS TO AID THE COUNTY IN MAKING A DETERMINATION OF VENDOR RESPONSIBILITY. PLEASE NUMBER EACH RESPONSE TO MATCH THE QUESTION NUMBER.			
14. DOES THE VENDOR USE, OR HAS IT USED IN THE PAST FIVE (5) YEARS, ANY OTHER BUSINESS NAME, FEIN, or D/B/A OTHER THAN THOSE LISTED IN ITEMS 2-4 ABOVE? List all other business name(s), Federal Employer Identification Number(s) or any D/B/A names and the dates that these names or numbers were/are in use. Explain the relationship to the vendor.		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
15. ARE THERE ANY INDIVIDUALS NOW SERVING IN A MANAGERIAL OR CONSULTING CAPACITY TO THE VENDOR, INCLUDING PRINCIPAL OWNERS AND OFFICERS, WHO NOW SERVE OR IN THE PAST ONE (1) YEARS HAVE SERVED AS:		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
a) An elected or appointed public official or officer? <i>List each individual's name, business title, the name of the organization and position elected or appointed to, and dates of service</i>		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b) An officer of any political party organization in Albany County, whether paid or unpaid? <i>List each individuals name, business title or consulting capacity and the official political position held with applicable service dates.</i>		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

16.	<p>WITHIN THE PAST (5) YEARS, HAS THE VENDOR, ANY INDIVIDUALS SERVING IN MANAGERIAL OR CONSULTING CAPACITY, PRINCIPAL OWNERS, OFFICERS, MAJOR STOCKHOLDER(S) (10% OR MORE OF THE VOTING SHARES FOR PUBLICLY TRADED COMPANIES, 25% OR MORE OF THE SHARES FOR ALL OTHER COMPANIES), AFFILIATE OR ANY PERSON INVOLVED IN THE BIDDING OR CONTRACTING PROCESS:</p>	
	<p>a) 1. been suspended, debarred or terminated by a local, state or federal authority in connection with a contract or contracting process;</p> <p>2. been disqualified for cause as a bidder on any permit, license, concession franchise or lease;</p> <p>3. entered into an agreement to a voluntary exclusion from bidding/contracting;</p> <p>4. had a bid rejected on an Albany County contract for failure to comply with the MacBride Fair Employment Principles;</p> <p>5. had a low bid rejected on a local, state or federal contract for failure to meet statutory affirmative action or M/WBE requirements on a previously held contract;</p> <p>6. had status as a Women's Business Enterprise, Minority Business Enterprise or Disadvantaged Business Enterprise, de-certified, revoked or forfeited;</p> <p>7. been subject to an administrative proceeding or civil action seeking specific performance or restitution in connection with any local, state or federal government contract;</p> <p>8. been denied an award of a local, state or federal government contract, had a contract suspended or had a contract terminated for non-responsibility; or</p> <p>9. had a local, state or federal government contract suspended or terminated for cause prior to the completion of the term of the contract.</p> <p>b) been indicted, convicted, received a judgment against them or a grant of immunity for any business-related conduct constituting a crime under local, state or federal law including but not limited to, fraud extortion, bribery, racketeering, price-fixing, bid collusion or any crime related to truthfulness and/or business conduct?</p> <p>c) been issued a citation, notice, violation order, or are pending an administrative hearing or proceeding or determination of violations of:</p> <p>1. federal, state or local health laws, rules or regulations.</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>
17.	<p>IN THE PAST THREE (3) YEARS, HAS THE VENDOR OR ITS AFFILIATES <b>H</b>AD ANY CLAIMS, JUDGMENTS, INJUNCTIONS, LIENS, FINES OR PENALTIES SECURED BY ANY GOVERNMENTAL AGENCY?</p> <p>Indicate if this is applicable to the submitting vendor or affiliate. State whether the situation(s) was a claim, judgment, injunction, lien or other with an explanation. Provide the name(s) and address(es) of the agency, the amount of the original obligation and outstanding balance. If any of these items are open, unsatisfied, indicate the status of each item as "open" or "unsatisfied."</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>
18.	<p>DURING THE PAST THREE (3) YEARS, HAS THE VENDOR FAILED TO:</p> <p>a) file returns or pay any applicable federal, state or city taxes? <i>Identify the taxing jurisdiction, type of tax, liability year(s), and tax liability amount the vendor failed to file/pay and the current status of the liability.</i></p> <p>b) file returns or pay New York State unemployment insurance? <i>Indicate the years the vendor failed to file/pay the insurance and the current status of the liability.</i></p> <p>c) Property Tax <i>Indicate the years the vendor failed to file.</i></p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>
19.	<p>HAVE ANY BANKRUPTCY PROCEEDINGS BEEN INITIATED BY OR AGAINST THE VENDOR OR ITS AFFILIATES <b>I</b> WITHIN THE PAST SEVEN (7) YEARS (WHETHER OR NOT CLOSED) OR IS ANY BANKRUPTCY PROCEEDING PENDING BY OR AGAINST THE VENDOR OR ITS AFFILIATES REGARDLESS OF THE DATE OF FILING?</p> <p>Indicate if this is applicable to the submitting vendor or affiliate. If it is an affiliate, include the affiliate's name and FEIN. Provide the court name, address and docket number. Indicate if the proceedings have been initiated, remain pending or have been closed. If closed, provide the date closed.</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>
20.	<p>IS THE VENDOR CURRENTLY INSOLVENT, OR DOES VENDOR CURRENTLY HAVE REASON TO BELIEVE THAT AN INVOLUNTARY BANKRUPTCY PROCEEDING MAY BE BROUGHT AGAINST IT? Provide financial information to support the vendor's current position, for example, Current Ration, Debt Ration, Age of Accounts Payable, Cash Flow and any documents that will provide the agency with an understanding of the vendor's situation.</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>

21. IN THE PAST FIVE (5) YEARS, HAS THE VENDOR OR ANY AFFILIATES<sup>1</sup>:

☐ Yes ☒ No

a) defaulted or been terminated on, or had its surety called upon to complete, any contract (public or private) awarded;

Indicate if this is applicable to the submitting vendor or affiliate. Detail the situation(s) that gave rise to the negative action, any corrective action taken by the vendor and the name of the contracting agency.

1 "Affiliate" meaning: (a) any entity in which the vendor owns more than 50% of the voting stock; (b) any individual, entity or group of principal owners or officers who own more than 50% of the voting stock of the vendor; or (c) any entity whose voting stock is more than 50% owned by the same individual, entity or group described in clause (b). In addition, if a vendor owns less than 50% of the voting stock of another entity, but directs or has the right to direct such entity's daily operations, that entity will be an "affiliate" for purposes of this questionnaire.



**ALBANY COUNTY  
VENDOR RESPONSIBILITY QUESTIONNAIRE**

FEIN # 134099444

State of: )  
) ss:  
County of: )

**CERTIFICATION:**

The undersigned: recognizes that this questionnaire is submitted for the express purpose of assisting the County of Albany in making a determination regarding an award of contract or approval of a subcontract; acknowledges that the County may in its discretion, by means which it may choose, verify the truth and accuracy of all statements made herein; acknowledges that intentional submission of false or misleading information may constitute a felony under Penal Law Section 210.40 or a misdemeanor under Penal Law Section 210.35 or Section 210.45, and may also be punishable by a fine and/or imprisonment of up to five years under 18 USC Section 1001 and may result in contract termination; and states that the information submitted in this questionnaire and any attached pages is true, accurate and complete.

The undersigned certifies that he/she:

- Has not altered the content of the questions in the questionnaire in any manner;
- Has read and understands all of the items contained in the questionnaire and any pages attached by the submitting vendor;
- Has supplied full and complete responses to each item therein to the best of his/her knowledge, information and belief;
- Is knowledgeable about the submitting vendor's business and operations;
- Understands that Albany County will rely on the information supplied in the questionnaire when entering into a contract with the vendor;
- Is under duty to notify the Albany County Purchasing Division of any material changes to the vendor's responses.

Name of Business Cora Group, Inc.

Address - 50 Lexington Avenue, #292

City, State, Zip New York, NY 10010

Signature of Owner

*Norma Tan, PhD*

Printed Name of Signatory Norma Tan

Title Owner, Principal

Sworn before me this 21 day of October, 2024

Notary Public

**LISSETTE APOLO**  
Notary Public - State of New York  
No. 01AP6319820  
Qualified in Queens County  
My Commission Expires 02/23/2027

Printed Name

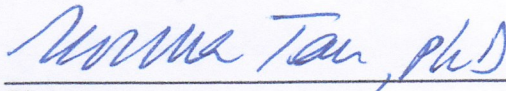
Signature

Date



**Attachment "D"**  
**Certification Pursuant to Section 103-g**  
**Of the New York State**  
**General Municipal Law**

- A. By submission of this bid/proposal, each bidder/proposer and each person signing on behalf of any bidder/proposer certifies, and in the case of a joint bid, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each bidder is not on the list created pursuant to paragraph (b) of subdivision 3 of Section 165-a of the New York State Finance Law.
- B. A Bid/Proposal shall not be considered for award, nor shall any award be made where the condition set forth in Paragraph A above has not been complied with; provided, however, that in any case the bidder/proposer cannot make the foregoing certification set forth in Paragraph A above, the bidder/proposer shall so state and shall furnish with the bid a signed statement which sets forth in detail the reasons therefor. Where Paragraph A above cannot be complied with, the Purchasing Unit to the political subdivision, public department, agency or official thereof to which the bid/proposal is made, or his designee, may award a bid/proposal, on a case by case business under the following circumstances:
1. The investment activities in Iran were made before April 12, 2012, the investment activities in Iran have not been expanded or renewed after April 12, 2012, and the Bidder/Proposer has adopted, publicized and is implementing a formal plan to cease the investment activities in Iran and to refrain from engaging in any new investments in Iran; or
  2. The political subdivision makes a determination that the goods or services are necessary for the political subdivision to perform its functions and that, absent such an exemption, the political subdivision would be unable to obtain the goods or services for which the contract is offered. Such determination shall be made in writing and shall be a public document.



Signature

Norma Tan, Owner, Principal

Title

Cora Group, Inc.

Company Name

24-Oct-24

Date

## SECTION I | Title Page and Table of Contents



50 LEXINGTON AVENUE, #292  
NEW YORK, NEW YORK 10010  
(212) 481-3661 | Office  
[www.coragroupinc.com](http://www.coragroupinc.com)

October 24, 2024

To: Ms. Pamela O'Neill  
Albany County Purchasing Agent  
112 State Street, Room 1000  
Albany, New York 12207

From: Norma Tan, Principal (Proposer)  
Project Advisor, Learning Systems Design Specialist  
347-200-2704 | Mobile

Christine Friello-Fini, Director of Operations and Marketing (Main Contact)  
Learning and Development Curriculum Designer and Facilitator  
215-854-9011 | Mobile

**Re: RFP-2024-129 | COMPREHENSIVE LEADERSHIP COURSE**

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## SECTION II

### ***Qualifications and Experience***

Thank you for this opportunity to propose how Cora Group can partner with the Albany County Department of Health (Albany DoH) to develop and deliver a Comprehensive Leadership Course designed to enhance the skills of its senior leadership team. We understand this two-year program (Jan '25 through Dec '26) has a primary goal of improving leadership efficacy among departmental staff by equipping people leaders with the necessary skills to lead teams effectively, communicate clearly, manage adversity, drive innovation, and oversee projects within scope, on time, and within budget.

Cora Group, Inc. -- a NYS and NYC certified MWBE founded in 1988 -- is recognized for our expertise in leadership development and capacity-building, and we have extensive experience providing consultative advisement, technical assistance, training design and delivery, and research and evaluation services to New York State and City agencies regarding organization change management. Our designs and facilitation techniques use an engaging, experiential, and job-relevant skill-building approach. We focus on promoting "everyday leadership" by helping employees at every organizational level gain new knowledge and capabilities that will enable them to communicate effectively and manage conflict creatively through processes that respect and leverage differences (i.e., in backgrounds, styles, roles, perspectives) and that fuel collaborative learning.

Our team approach models the mindsets and skills involved in effective communication and problem-solving across diverse backgrounds and perspectives. Our facilitators intentionally leverage their different perspectives, as well as those of the participants "in the room," using cross-cultural competencies that we know to be necessary for effective communication and problem-solving in a diverse, fast-paced, and technologically mediated workplace environment. We demonstrate, while making transparent, how mutually reflective workplace behaviors use conflict for problem-solving to advance common goals. We show how problems can be best solved by applying communication skills and processes that benefit from technical understanding and receptivity to what each contributor sees and brings to the table, crucial abilities in the journey toward effective change management.

Our team is well-suited and prepared to provide the services requested by Albany DoH. We use an interdisciplinary, multicultural, and intergenerational team approach that provides:

- Seasoned practitioners with extensive experience designing and delivering adult and workplace learning processes and events focused on organizational culture and performance, leadership development, employee well-being, and growth,
- Depth of expertise, informed by state-of-the-art theory and evidence-based research, and best practice,
- Customized curriculum design solutions that leverage team members' diverse knowledge and backgrounds to meet specific needs, working collaboratively with clients, and
- Flexible team capacity that allows for targeted and efficient use of project resources to achieve high-quality products and timely service delivery.

Our work fosters authentic working relationships since meaningful change and continuous growth only happen when people within organizations feel fully supported. Our team strives to connect with our clients through collaborative discovery. Working with our clients, we discover and articulate needs and create solutions as a united front. Authentic collaboration of this kind is essential to any change process since "involvement creates commitment."

### ***Our Select Team***



**Norma Tan, PhD**  
Principal,  
Cora Group, Inc.  
Project Advisor,  
Learning Systems  
Design Specialist



**Christine Friello-Fini**  
Project Manager,  
Curriculum  
Designer,  
Coach, and  
Facilitator



**Mon Sai Aung**  
Project  
Administrator and  
Technical  
Coordinator



**Maria Badali**  
Client Advocate,  
Curriculum  
Designer, Coach,  
and Facilitator



**Lori Roth Gale, EdD**  
Needs  
Assessment and  
DiSC Specialist



**Robert Louis-Charles**  
Project Advisor,  
Adjunct Curriculum  
Contributor,  
Coach, and  
Facilitator

Together, as trusted advisors to Albany DoH, we bring an extensive knowledge base and honed skill sets that will significantly inform the design and delivery of Albany DoH's Comprehensive Leadership Course. As a team, we can produce a quality process, product deliverables, session facilitation, and follow-up consultation within the specified project timeline. Our team members, and their project roles, are as follows:

- **Dr. Norma Tan**, Cora Group's Principal and Owner, will oversee contract and service delivery to ensure that the quality of services and deliverables exceed Albany DoH's expectations. She will provide expert consultative guidance to the team as they design and deliver for Albany DoH.
- **Christine Friello-Fini** will serve as Project Manager and co-Curriculum Designer. She will oversee all aspects of project delivery and help the team to develop, agree on, and

adhere to task schedules and deadlines, communication protocols, and quality standards.

- **Mon Sai Aung** will partner with Christine in her efforts and provide expert technical and administrative support services for the project. Together, Christine and Mon will ensure the completion of required deliverables on time and within budget.
- **Maria Badali**, will serve as Client Advocate and co-Curriculum Designer, in partnership with Christine, and both will serve as the primary coaches and co-facilitators for program delivery.
- **Dr. Lori Roth Gale** will assist the team in needs assessment, DiSC profiles, and post-program evaluation processes.
- **Robert Louis Charles** will serve as a project advisor, and adjunct curriculum contributor, coach, and facilitator.

## ***Resumes***



### **Norma Tan, PhD, Principal, Cora Group, Inc.**

Dr. Norma Tan co-founded Cora Group, Inc., a minority- and woman-owned consulting practice in 1988. A learning systems specialist and educational researcher, Norma advises clients on assessment, evaluation research, adult experiential learning curriculum design, and training implementation to enhance their problem-solving capacity, using perspectives and information from diverse sources for effective decision-making.

Norma coaches senior leaders, managers, and front-line teams to maximize their talent and leadership potential. Through process coaching, training design and delivery, and technical assistance, she helps individuals and work communities reflect on actualizing their values through business processes that serve and benefit people. She has an extensive background in helping organizations to clarify their identity and goals and devise sound organizational strategies to address the concerns of diverse stakeholders, clients, and the public.

Norma is certified in using Human Synergistics professional development systems and assessment tools. Her client base includes government agencies, foundations, and service organizations focused on public health, healthcare, education, arts and culture, human rights, social advocacy, and community development. She served on the Institute for Not-for-Profit Management, Columbia Business School faculty, as a research director at the Metropolitan Center for Urban Education, New York University, and before that at Baruch College, City University of New York. She is currently a mentor with the New York Leadership Fellows Program. Norma earned her Doctorate in Educational Psychology from Columbia University.





**Christine Friello-Fini, Cora Group's Director of Operations and Marketing**, and lead learning and development curriculum designer and facilitator, is an organization development practitioner with combined skills and consultative experience in organizational psychology, adult learning theory and strategy, curriculum design and training facilitation, and diversity, equity, and inclusion leadership. She has over 30 years of experience leading complicated workplace change efforts for highly matrixed global organizations, including their supporting learning and development programs.

Using a people and person-centered approach to designing experiential learning programs, Christine aims to improve group dynamics and harmony while strengthening individual performance, mindfulness and well-being, employee engagement, and talent retention. She has strong curriculum design skills, and her workshops help people learn and bond, using strategies that enhance communication between people, groups, and teams. Her strength as an empathic, purpose-driven leader helps others embrace ambiguity and constant change while recognizing the systemic forces that affect behavior, mindset, human potential, and personal development.

Christine applies her passion for organizational development to support business leaders in creating compelling learning and development programs that align with enterprise-wide human resources goals and provide relevant, timely, high-impact social solutions supporting clients' current and future needs. This work is grounded in a holistic approach to learning, personal development, and growth that empowers people to embrace change and strengthens their capacity for innovation. She has created and facilitated learning programs for ARTZ Philadelphia, AXA XL Insurance, the City University of New York, Fire Department of the City of New York (FDNY), NYC Department of Citywide Administrative Services (DCAS), NYC Department of Finance, NYC Public Schools' Students in Temporary Housing and Foster Care division, NYC Parks, Humana's Asian and Pacific Islander network resource group, and the Universidad de los Andes.

Christine is an active board member for two nonprofit organizations and is deeply involved with both organizations' strategic planning and learning and development needs:

As vice-chair of ARTZ Philadelphia, she actively works to enhance the dignity, quality of life, and well-being of people living with dementia and their care partners through joyful interactions around arts and culture. She is a mentor for the ARTZ@ Jefferson Hospital program, helping foster in young healthcare students enhanced clinical skills, empathy, compassion, and inclusiveness toward people living with dementia.

As treasurer for The Green Flag Committee for Children's Charities, she is committed to enhancing Cumberland County, New Jersey's overall quality of life through volunteerism and charitable activities, with a strong focus on youth and children's charities.

Christine earned her Masters degree in Organizational Psychology and Change Leadership from Teachers College at Columbia University and her Bachelor of Architecture degree from Pratt Institute. She is a New York State licensed architect, certified interior designer, and a

specialist in the psychology of the built, remote, and hybrid workplace environment and its effect on human behavior and performance.



**Mon Sai Aung, Cora Group's Project Administrator and Technical Coordinator**, is exceptionally skilled at conducting stakeholder surveys, designing visual interfaces and data capture tools, analyzing data, and preparing presentations of findings. He provides technical assistance in collecting and analyzing data, working directly with client groups, and supporting project teams by coordinating consultant communications and tasks.

Mon works closely with project team members to facilitate processes, ensure quality service delivery, and diligently maintain company finances.

Mon has worked with clients such as the NYC Administration for Children's Services (ACS), the Asian American Arts Alliance, the Asian American Writers Workshop, My Sisters' Place, and UA3 (a food pantry and resource-sharing network.) While working with ACS, he conducted literature searches, designed evaluation tools and plans, participated in interviews evaluating ongoing project processes, and gathered feedback from project participants to help ACS learn the feasibility of implementing a pilot intensive care model in foster care populations of NYC. For UA3, Mon assisted with discovering needs and gaps in their food pantry operations, information systems, data collection, and analysis methods. He also assisted in incorporating the In-Kind and Grant tracking systems within the client's existing accounting system (QuickBooks), helping to prevent extra expenses from being incurred when acquiring new applications and training.

In addition to his professional activities, Mon uses his knowledge and skills to support social justice organizations. He is dedicated to affirming LGBTQ rights, culture, and representation. In his home country, Myanmar, he volunteered and participated in meetings at a non-profit organization called &PROUD. In 2019, during Myanmar's election, Mon helped &PROUD facilitate a social media campaign called "Pink Pinky Challenge" by getting local influencers and celebrities to raise awareness about LGBT votes and encouraging the community to participate in the election.

Mon earned his Bachelor of Business Administration degree in Finance with a minor in Psychology from Baruch College, City University of New York. He also graduated from the Data Analytics Bootcamp at Columbia University in 2022, where he learned programming languages, data management, and analysis tools such as Python, Structured Query Language (SQL), and Visual Basic for Applications (VBA).



**Maria Badali, Lead Designer, Coach and Facilitator**, is an accomplished management consultant with two decades of experience across sectors, industries, and geographies. As the Principal and Lead Consultant at Arkle Consulting Group, she specializes in change management, strategic and succession planning, and organizational and team effectiveness. She works with organizations from the nonprofit, private, and public sectors to identify and address their most critical challenges to best position them for successful and sustainable futures.

Maria's multidisciplinary and multicultural skills provide her with a unique perspective when developing individual and organizational success strategies. She can effectively integrate business operational and human dynamics to achieve desired outcomes. She is appreciated for her technical skills and ability to connect with diverse audiences with authenticity and heart.

Maria has designed and led signature training and development programs to build skills and capacity for client organizations, partnered with Fortune 500 clients to design and implement Diversity and Inclusion strategies and supporting organizational systems and structures, created numerous strategic plans for mission-driven clients, and advised leaders on implementing and managing significant organizational changes.

As a facilitator, consultant, and executive coach, Maria has engaged with a wide range of organizations, including the Asian American Business Development Center, ASPCA, Brooklyn Community Services (BCS), Columbia University School of Public Health, Covenant House International, Credit Suisse, Dramatist Guild Fund, East Harlem Block Nursery, Fire Department of the City of New York (FDNY), The Metropolitan Museum of Art, National Park Service, Novartis, NYC Administration for Children Services, NYC Parks and Recreation Department, NYCT MTA, Pfizer, Policy Committee on NYC Hunger Resources, Sandoz, Settlement Health, Roche, Unilever, and YWCA USA.

Maria serves on the Board of the Association of Nonprofit Specialists, a 30-year-old membership organization led by a working Board of Directors; she is a former Co-Chair and is a member of the Executive Committee. Her passion for consulting and commitment to continuously enhancing the field led to developing The Nonprofit Consultants Institute, which is now the Association's signature annual program where Maria has been a key facilitator for all nine annual Institutes.

Maria earned her MBA in Strategic Management and Finance from the Zicklin School of Business at Baruch College and Master's degree in Linguistics and Pedagogy from the University of Petrozavodsk, Russia.



**Lori Roth Gale, EdD, Needs Assessment**, founded Strategic Learning Associates, a consulting group that provides professional development for mission-driven organizations, working with management, staff, and boards. Services include organization development, professional education program and needs assessment, education design, executive coaching, research, and data analysis.

Dr. Roth Gale is a part-time Assistant Professor at the New School for Public Engagement's Milano School. She teaches Masters-level seminars on Management and Organizational Behavior, Leadership Development, Organization Diagnosis, and capstone project research. From 2004-2010 Lori served on Columbia Business School's Executive Education Faculty and as executive director of Columbia's Institute for Not-for-Profit Management from 1996-2004. She works with a range of clients in the not-for-profit and public sectors.

Recent clients include the AHRC, City University of New York, Department of Citywide Administrative Services, NYC Parks Department, New York Community Trust, Partnership for Afterschool Education, The New School, United Nations, United Way of NYC, and Westchester Community Foundation. Public Sector clients while at Columbia Executive Education include the NYPD, FDNY, and US Customs Service.

Lori's recent work in organization development has been with a large human service agency over a five-year period, developing leaders from the program director level to C-suite, and supporting organizational change in preparation for senior leader succession and restructuring. This work engaged members in inter-departmental collaborations to develop shared vision, innovation and experimentation to bridge silos and serve clients more effectively. Changes identified in this process were successfully prototyped and implemented on a larger scale.

Lori earned her doctorate in Adult Learning and Leadership at Teachers College, Columbia University. She is a graduate of the Yale School of Management and Brandeis University. Her professional development includes a certificate in Organization Development and Human Resource Management from Teachers College; and further study at The Gestalt OSD Center, the Presencing Institute, Adaptive Change Advisors; and The New School. Lori is a certified MBTI and DiSC practitioner.



**Robert Louis-Charles, Advisor and Coach**, is an experienced organizational strategy consultant and leadership coach who takes a holistic well-being approach to help people, teams, and organizations thrive. His impact is in leading organizational change and facilitating transformation in the private and public sectors.

Robert's work helping leaders and staff to move through change has, by necessity and design, given him knowledge and fluency to engage audiences effectively as a facilitator and trainer and empower individuals and teams to appreciate and master the shifts in mindset, skills, and behaviors necessary to be effective in the workplace.

Robert helps leaders and staff reach their organizational objectives through planning and preparation, collaborative learning, and testing new practices that consider critical dimensions of leadership, performance, and culture change in the workplace environment, where developing a sense of inclusion and belonging can be incredibly challenging. When facilitating leadership learning and development programs, Robert incorporates inquiry and problem-solving focused on diversity, equity, and inclusion best practices for sustaining and maximizing psychological safety, communication, learning, and teamwork.

Robert's work models the best practices for leaders and other contributors that create psychological safety and more inclusive workspaces. As an executive coach, Robert is highly skilled and experienced in advising emerging leaders on solutions to improve personal, professional, and managerial growth areas. He is insightful and empathetic, uses a structured yet flexible process, and listens profoundly and thoughtfully. With his calm, intelligent demeanor, Robert knows when to set boundaries, challenge, encourage, and support, and is guided by a strong desire to serve the client's best interest.

Robert has over two decades of experience designing and delivering transformative learning experiences. He has served as a professor, instructional designer, and workforce development trainer, developing company-wide programs on topics including navigating company culture, leadership development, allyship, intersectionality, microaggressions, cultural competency, and diversity and inclusion.

Robert spearheads this work as Executive and Co-Founder of several wellness-based businesses. Robert earned his Masters degree in Counseling Psychology (Spirit, Mind, Body, Practice) at Columbia University. He also holds a Masters degree in Strategic Communication from Seton Hall University with certifications in Organizational Communication and Entrepreneurial Studies. Additionally, he has a Bachelors degree in Journalism from Ohio Wesleyan University and a certificate in Change and Leadership from Ohio State University.

### **SECTION III**

#### ***References and Related Project Experience***

##### **Fire Department of the City of New York | Leadership Development Program**

Reference:

Dr. Kwame Cooper, Chief Diversity and Inclusion Officer  
Fire Department of the City of New York (FDNY)  
kwame.cooper@fdny.nyc.gov | 718-999-2000

Cora Group, in a joint venture with ATS+Partners, is currently collaboratively offering expertise and services to assist the Fire Department of the City of New York (FDNY) in creating a Leadership Development Program (LDP) suitable for all supervisory FDNY personnel, including developing and implementing a "Train the Trainer" framework to ensure continuity of the program, preparing members of the Department to administer the LDP in 2025.

This vital project aims to prepare and empower FDNY managerial personnel with enhanced leadership strategies, skills, and tools incorporating four principles: Authentic Leadership, Cultural Awareness, Compassionate Conflict Resolution, and Effective Communication,



rooted in the precepts of diversity, equity, inclusion, cultural sensitivity, anti-discrimination, and anti-harassment.

Our work is focused on building the entire organization's capacity to adapt, innovate and succeed. Our consultative and design approach engages leaders, training facilitators, and employees in critical thinking and experiential discovery, drawing on proven principles and best practices for promoting adult learning.

We are enabling FDNY to leverage the benefits of difference by helping members clarify their shared goals, core values, mutual expectations, and the skill sets needed to build a culture that fosters respect, learning from differences, and effective problem-solving. These skills enable members to:

- Continuously learn from one another as peers and mentors,
- Elicit and benefit from contributions from all members of the team, and
- Involve diverse stakeholders in problem-solving to enhance knowledge-sharing, cross-cultural understanding, and service excellence.

#### **NYC Department of Parks and Recreation | Winter Leadership Conference**

Reference:

Joy Wang, Deputy Commissioner and Chief Administrative Officer  
NYC Department of Parks and Recreation  
joy.wang@parks.nyc.gov | 212-639-9675

In consultation with the NYC Parks Commissioner and her senior staff, Cora Group designed and facilitated the Winter Leadership Conference 2023, a one-day leadership development curriculum that our consultant team then delivered to all supervising leaders (approximately 1,200 participants) over ten days. This interactive, hands-on curriculum included:

- Conveying research-informed insights on people-centered leadership and its role in strengthening management and supervision to build agency capacity and resilience,
- Hands-on interactive sessions that used experiential exercises (e.g., self-assessment and reflection, case studies, role plays) to engage participants in knowledge-sharing and skill development, and
- Depth of content including emotional intelligence, interpersonal styles/valuing and leveraging differences, giving and receiving constructive feedback for individual and team development, and motivating, developing, and retaining employees.

The curriculum enabled leaders throughout the Agency to align on an understanding of what people-centered supervision and leadership mean and the expected benefits of culture change through learning. Our instructional processes established an open climate for productive discussion and problem-solving, building on the organizational intelligence that participants brought into their group sessions.

#### **NYC Department of Citywide Administrative Services**

Reference:

Rajendra Persaud, Executive Director | Training and Business Services  
NYC Department of Citywide Administrative Services

rapersaud@dcas.nyc.gov | 212- 669-1357

Under Cora Group's multi-year contract with DCAS, we designed and delivered courses on Leadership and Supervision for City employees from various City agencies, including the City University of New York; Departments of Corrections, Education, Environmental Protection, Finance, Economic Development, and Parks; Kings County Public Administrator, and Office of the Medical Examiner.

Course curricula that we have designed and delivered under this contract include:

- Diagnosing the Organization to Build a High-Performance Culture
- Engaging Teams Through Turbulent Times
- Influencing without Authority
- Leadership and Strategic Change
- Leading Effective Meetings: Becoming a Meeting Master
- Presenting Persuasively in Person and Virtually
- Promoting Psychological Safety to Improve Performance
- Psychological Dimensions of Leading and Supervision
- The Motivation Workshop: Bringing Work to Life

Our courses and instructors consistently receive high evaluation ratings and positive participant feedback.

**NYC Department of Education | Students in Temporary Housing and Foster Care**

Reference:

Corrine Christison, Director of Interagency Collaboration  
Office of Students in Temporary Housing and Foster Care  
NYC Department of Education  
cchristison@schools.nyc.gov | 718-935-2200

DoE's Office of Community Schools' Students in Temporary Housing and Foster Care team engaged Cora Group to design and facilitate a series of learning and development programs for Shelter-Based Community Coordinators. The intent has been to increase the capacity of schools and community partners to provide expanded learning opportunities, social services, healthcare, and other support services for students and families affected by homelessness.

The training and facilitation series included:

- Building Your Personal Brand and Professional Network
- Confronting Conflict to Save Relationships
- Leading Effective Meetings | Becoming a Meeting Master
- Negotiation Essentials | Collaborating for Win-Win Outcomes
- Influencing without Authority
- Interviewing Essentials for Career Advancement

### **Humana | Asian and Pacific Islander Network Resource Group**

Reference:

Rohan Vodra, Informatics Lead | Network Trend Management  
Humana | Asian Pacific Islander Network Resource Group  
rvohra@humana.com | 502-580-1000

For Humana's Asian and Pacific Islander Network Resource Group (HAPI), our team designed a customized curriculum on becoming an "everyday leader". We then delivered the curriculum virtually to a national audience of 150-200 Humana employees. The curriculum contained theory and research on leadership, with small group exercises to strengthen awareness and skills for developing an "everyday leadership" mindset. Additionally, the curriculum provided insight into typical management situations requiring cross-cultural awareness and behavioral flexibility to elicit motivation and high performance from diverse colleagues and team members.

The four curriculum modules included:

- Leadership - Being a leader in any role, demonstrating leadership in daily interactions
- Making Sure Your Voice is Heard - Being intentional when communicating in meetings and conversations
- Conflict Management - Handling disagreement and using differences to find better solutions
- Personal Branding - Crafting a confident personal brand

A follow-up survey administered by Humana captured highly favorable feedback from participants.

### **Brooklyn Community Services | Leadership Development**

Our team set out to help BCS senior leadership develop a culture of empowered leadership by infusing an operational understanding of five values articulated in their most recent Strategic Plan into the BCS Culture. This work included:

- Developing key leaders to ensure alignment around organizational culture and values, understanding how to consistently "walk the talk," and intentionally creating a leadership pipeline.
- Clarifying general expectations of senior leaders and engaging Division Directors in an action learning process to improve their skills.
- Improving the onboarding process to benefit from explicit conversation and alignment around organizational culture, values, expectations of leaders at various levels, and the support needed from executive leadership.
- Strengthening Division Directors' individual and collective leadership skills, with messaging and executive team support, to create a significant positive ripple effect throughout the entire organization due to their personal and collective reach.

Key deliverables included the following:



- Design and facilitation of an interactive session with the executive team to discuss the internal operational implications of BCS values and what that means for a desired BCS leader profile moving forward.
- Determination of expectations of specific leadership roles
- Development, deployment, and results analysis of a pre-engagement survey
- Customization and facilitation of three half-day workshops for Division Directors
- Incorporation of Action-Learning assignments and peer coaching meetings between the sessions, and
- Development, deployment, and results analysis of a post-engagement survey

#### **Credit Suisse | Leadership Development**

Our team led a diagnostic process focused on experience, attitudes, and perceptions about the career experiences of Black professionals. The goal of this assessment was to learn more about the experiences of the study group in different businesses and functions to help the client better understand workplace-related successes and challenges, and to identify opportunities to better leverage existing talent management and Diversity and Inclusion efforts. Based on what we learned from the diagnostic, we partnered with the client to develop and facilitate a year-long Leadership Intensive for Black Professionals.

#### **SEIU1199 | Labor Management Project**

Cora Group developed a curriculum to enhance the coaching skills of organizational development consultants working with management and union staff of health and hospital service institutions across the New York metropolitan area.

The curriculum was delivered in parallel to two separate groups, LMP managers and LMP consultants, with emphasis on the role of coaching in the development of leadership and supervision skills. The curriculum was designed to impart knowledge of fundamental principles of coaching and to provide interactive, experiential learning opportunities covering a wide range of topics necessary for a consultant to perform effectively as a coach to leaders and supervisors in an organizational setting.

Additionally, individual coaching sessions gave participants an opportunity to:

- a) Experience a style self-assessment as a coachee, and
- b) Observe a skilled coach facilitating the administration of the assessment, as well as the co-interpretation, debrief, and follow up with the coachee in the creation of a professional development plan.

Prior to delivery, the Cora Group team assessed the learning needs of participants via interviews and an online survey; designed a curriculum consisting of six (6) 4-hour classroom sessions and three (3) individual coaching sessions per participant; and delivered the group and individual coaching sessions. At the conclusion of the project, Cora Group packaged the curriculum and provided recommendations to LMP leadership on next steps for continuation of coaching skills development of LMP consultants.

### **NYC Department of Health and Mental Hygiene**

For DoHMH's Bureau of Environmental Surveillance and Policy, Cora Group conducted a user experience study to assess and recommend improvements to an interactive website portal and database containing environmental health information. The work included:

- Developing testing methodology and then piloting the portal with representative website users (educators, public health policy analysts, community board staff members, and community-based organization staff).
- Analyzing data, developing findings and recommendations, and presenting to agency leadership and technical staff.

Under the CDC's National Environmental Public Health Tracking Network umbrella, Cora Group strategized with the New York City Department of Health and Mental Hygiene's Assistant Commissioner for Environmental Surveillance and Policy to design an education-centered initiative to grow the user base of an environmental health information portal. The work included:

- Conceptualizing and implementing a teacher professional development program to enable middle and high school students to provide instruction aligned with National and New York State learning standards,
- Partnering with middle and high school teachers in developing educational curriculum modules to support using a health information portal and interactive database, and
- Conducting outreach, piloting modules with NYC middle and high school teachers, gathering feedback, and revising and finalizing modules for online access and use by educators.

A select group of New York City special education teachers formed an Inquiry Team to design Common Core bundles for dissemination citywide as a result of our work.

For DoHMH's Bureau of Chronic Disease Prevention and Control, Cora Group evaluated an educational program's pilot curriculum design to promote Active Design guidelines. These guidelines, adopted by New York City agencies, are now a standard reference influencing New York's urban environment and architecture. The work included:

- Co-designing the evaluation process with the client,
- Conducting qualitative inquiry and data collection in pilot classrooms, and
- Developing and presenting findings to stakeholders to improve curriculum, program design, and future implementation.

### **Pfizer Corporation**

Cora Group provided training and technical assistance to employees in a clinical trials research division. Conducted an annual learning needs assessment over a period of three years and worked closely with division leaders to engage staff in training to enhance their leadership and supervisory skills in a context involving virtual communication, cross-functional matrix teams with different lines of leadership authority, and organizational change and growth.

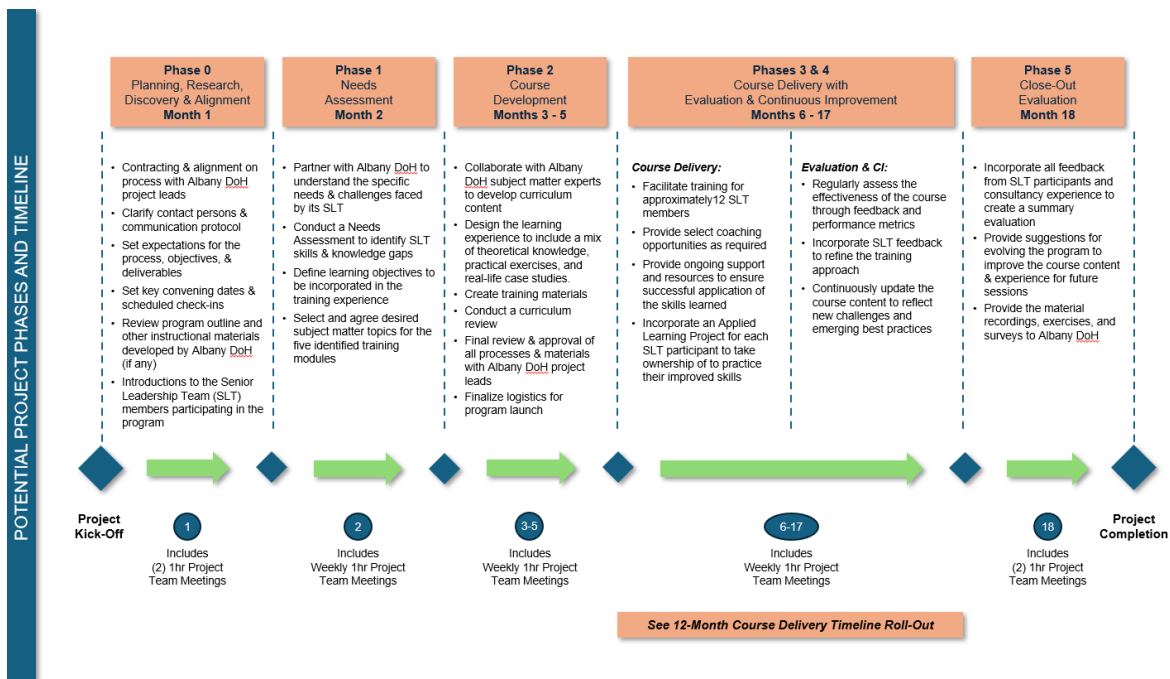
Based on the results of the annual learning needs assessment (and sometimes other assessments), our consultant team designed instructor-led training sessions and provided group and individual coaching to strengthen employees' organizational skills in the areas of leadership communication, management and supervision (including staff coaching and delegation), team-building, conflict management, and decision-making.

## SECTION IV

### Plan Implementation

Cora Group strongly supports Albany DoH's mission to protect and improve the health of individuals, families, and communities, utilizing strategies that reduce health disparities and promote health equity. We are committed to designing and facilitating a comprehensive leadership learning experience that will strengthen participants' dedication to fostering a culture of ongoing learning, innovative leadership, and adaptive success in pursuit of this goal.

The following chart [ALSO UPLOADED SEPARATELY] details our understanding of the requested services, the necessary scope of work and schedule for collaborative design/development, delivery, and after-action learning. It shows the anticipated sequence of project tasks and deliverables, with exact dates of performance to be determined in consultation with Albany DoH:



### Creating a Culture of Learning by Investing in Leadership Competencies

Leaders face challenges when working together on the myriad issues that arise in today's fast-paced governmental settings and technology-mediated agency environments. Agency members must continually learn on-the-job, drawing on different resources to solve complex problems in changing team configurations. It is, thus, especially important for them to benefit

from their different backgrounds, styles, expertise, and organizational roles and responsibilities. Adaptability to meet new challenges, and the ability to support others in doing so, must be nurtured, and especially among those who aspire toward, or step into, leadership roles in public service.

Leadership is critical in fostering cohesion around a common set of values and behavioral norms. The hallmark of exemplary leadership is the ability to develop an intellectually and emotionally "safe" and constructive work culture that promotes knowledge and information flow, creative problem-solving and fairness. Moreover, in an increasingly fast-paced and diverse society, all workplaces must equip members with the skills and ability to draw on multiple perspectives and styles to arrive at solutions that will effectively address the needs and expectations of a diverse constituency. Leaders must be able to respond to both familiar and unexpected situations, and act on opportunities to meet new and often unprecedented challenges. They can do this best by gaining self-awareness and interpersonal skills through which to appreciate and leverage the knowledge and talents of diverse colleagues to better serve the public.

Every person has the potential to exercise leadership in everyday situations. They do this when they are motivated by a collective mission and vision, relate to others constructively, exhibit resilience in times of adversity, and have realistic expectations about their ability to control events. "Everyday" leadership involves being able to consider perspectives other than one's own, and to accurately grasp what is happening in situations. Leaders help others develop common understandings to work cooperatively, using conflict and differences to learn and improve their performance and solutions. The acquisition of these various leadership competencies is essential for effective job performance, continuous improvement, and innovation.

Our team proposes to partner with and support Albany DoH to enhance their members' leadership skills via a high-impact experiential leadership development program; one focused on self-awareness, clarification of personal and organizational values, authenticity and accountability, critical thinking and the range of interpersonal communication and management skills needed to support adaptive organizational learning and change. We bring a wealth of experience working with government agencies on leadership development initiatives. We work as a collaborative thought partner with our clients, helping them assess their organizational needs, and shape programmatic initiatives to address those needs while identifying and maximizing growth potential in the workforce.

### ***Our Recommended Approach***

Current, new, and emerging leaders benefit from a combination of technical and interpersonal skill-based training to understand how to align values, behavioral norms, and the Albany DoH culture with their authentic voice. Employees want to feel like they are being invested in and positioned for long-term success. This commitment is demonstrated by providing new and emerging leaders with proven tools for growth, organization and industry best practices, guidance on creating business processes, and training to develop a leadership mindset. Positioning current, new, and emerging leaders with the skills to lead tomorrow's workforce is critical. This includes gaining insight into one's communication and leadership style, as well as ways to work effectively and to leverage the strengths of others with different styles. Importantly, leaders must be able to motivate and inspire others through their commitment to



the agency's mission and core values and convey the "why" (compelling purpose and rationale) that underlies all of the organization's goals and activities.

In responding to the request for a Comprehensive Leadership Course, we here recommend, rather than prescribe, our tried-and-true collaborative approach to the assignment that will be most effective in building leadership capacity and long-term organizational health in pursuit of the agency's mission.

Our recommended approach includes an initial discovery and assessment phase through which a management plan can be co-developed with Albany DoH representatives. The specifics in the management plan will draw on available background information, agency member perspectives and insights, as well as the knowledge and expertise that our team brings to the task of developing and delivering a multi-level training curriculum built around a common set of core, or foundational, leadership competencies. Once the management plan is co-developed, the multi-level curriculum will be delivered to the selected members of senior leadership (approximately 12 people.) Our approach also anticipates the need for continuous practice with coaching feedback during the Learning Delivery phase of the 2-year initiative.

### ***Curriculum Design***

We envision a customized curriculum targeted to the needs of the selected members of senior leadership with curriculum materials and methods that are job-relevant, highly experiential and immediately transferable to day-to-day experiences in the workplace. Topics will cover those specified by Albany DoH at the outset (i.e., the focus on effective communication, people-centric leadership, growing resilience, fostering innovation, and enhancing management capabilities.) Topics will not necessarily be covered as stand-alone areas of content; instead, they will be introduced as part of an integrated curriculum customized to achieve the specific, desired outcomes of this significant leadership development project.

Participants will have a chance to acquire conceptual frameworks that help them better recognize multiple dimensions of a situation, and how their mindsets, styles and behavioral responses can affect and/or influence the thoughts, actions and motivations of others. Each topic will be presented in ways that engage participants in reflecting critically on their experience and applying tools and concepts to "top-of-mind" scenarios.

The program will be designed to accommodate various adult learning styles using a variety of techniques – e.g. whole group in-person discussions, online interactive workshops, small group peer exchanges and support, individualized self-assessment and reflection, one-on-one coaching, etc. Participants will work in pairs or small groups to build community as peer learners, bridge organizational silos, and promote shared understanding of the agency as a whole, how it sets and aligns priorities, and how desired leadership qualities can be identified, modeled and practiced. Where appropriate, case studies and simulations will be used to introduce concepts; for example, participants may be asked to create their "own case" studies to apply learned frameworks to challenges they currently face, thereby practicing observational, analytic and interpersonal skills involved in being an effective workplace leader and change agent. Participants can receive feedback in small-group formations (learning through feedback from peers and facilitators) to unpack each case and can conclude with individual action plans. We also recommend agency follow-up to support ongoing application and positive impact.

Participants will benefit from grounding their leadership growth in self-assessments, such as CD-RISC, DiSC, or other assessment tools, to provide feedback on leadership style and personal style. Use of these tools increases understanding of one's personal preferences and blind-spots, and ways to recognize and work effectively across different styles.

### ***Training Delivery***

Our instructional processes will establish an open climate for productive discussion and problem-solving, building on the organizational intelligence that participants will be bringing into the room. Instructors will gain agreement on workshop guidelines to encourage a comfortable climate for group discussion activities, and creative thinking. They will ensure an inclusive process where many perspectives are heard and considered. They will also monitor the use of time to help the group advance their learning through reflection and discussion of content with experiential skill practice using, for example:

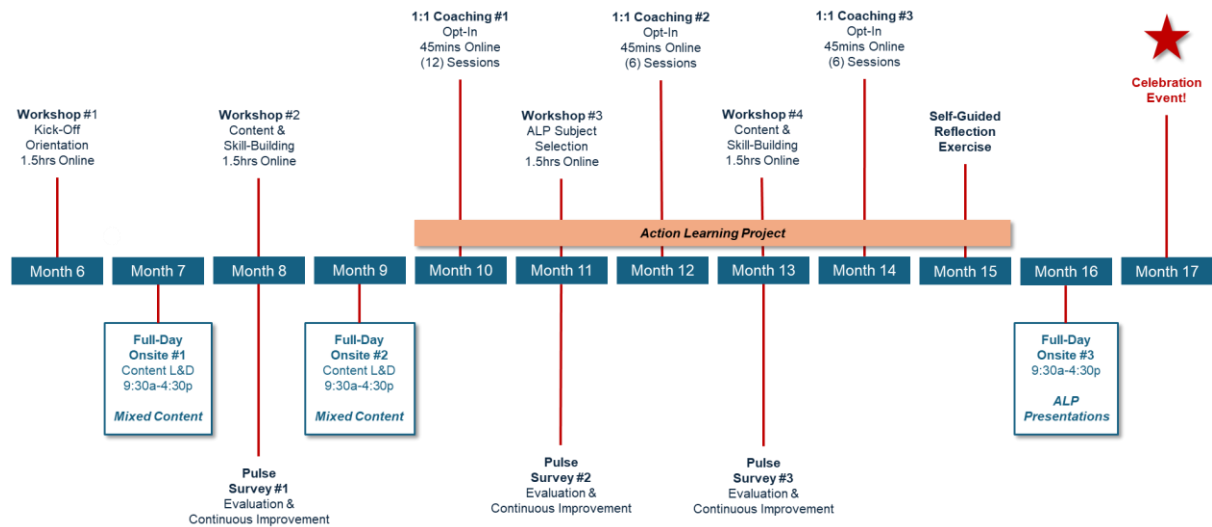
- Self-assessment
- Reflection tools
- Presentation
- Small and large group discussion
- Case study analysis
- Simulation
- Skill-building plan

Working with a coach allows participants to identify ways to use critical thinking, feedback, and self-reflection to grow (i.e., in self-knowledge, interpersonal effectiveness, influence and personal satisfaction.) The coach-participant collaboration supports personalized professional development through the subsequent creation of an individual learning agenda. This agenda helps individuals feel supported while also empowering them to be self-directed learners in pursuit of their own developmental goals. The plan clarifies their long-term vision for themselves, their goals and the strategies by which they plan to reach those goals. It also includes methods through which to evaluate their process along the way. It is, thus, a vehicle to implement their learning in real-life situations, and over time.

### ***Preliminary Course Structure***

Our preliminary vision for the twelve-month period of the Phase 3 and 4 course delivery with evaluation and continuous improvement looks like this:

[ALSO UPLOADED SEPARATELY]



Creating a comprehensive leadership development course focused on effective communication, being people-centric, growing resilience, fostering innovation, and enhancing management capabilities for the senior leadership of a large service organization requires a carefully structured collaborative approach that builds on the agency's own understanding of its workplace culture and vision.

We envision:

- Four (4) 1.5 hour online workshops that will:
  - aid in orienting participants to the program,
  - focus on content understanding and skill-building toward new behaviors,
  - determine target challenges for the Action Learning Project, and
  - support skill-building associated with the Action Learning Project
- Three (3) full-day onsite training sessions that will:
  - dive deeply into the how and why of effective communication, being people-centric, growing resilience, fostering innovation, and enhancing management capabilities, and
  - provide participants an opportunity to present the results of their Action Learning Project, and learn from one another's experiences.
- Twenty-four (24) optional 45-min coaching sessions that will:
  - Allow individuals who have a thirst for coaching to have time with one of our expert consultant coaches, and
  - Spend time in thoughtful reflection and discovery to build their leadership skills, executive presence, confidence.
- One (1) Self-Guided Reflection Exercise that will help participants take stock of their Action Learning Project; what worked, what didn't work, what they learned, and what they would share with others.
- Three (3) Pulse Surveys that will allow for evaluation and continuous improvement during the program in advance of the Phase 5 Close-Out Evaluation.

- **Celebration Event:** hosted by Albany DoH, to acknowledge the achievements of the participants and show support for their continued application of their learning.

The above approach offers Albany DoH a powerful means to strengthen the knowledge and skill base of crucial leadership team members and will enable these individuals to model and promote desired behaviors throughout the organization, allowing them to serve as ongoing resources to address new opportunities and challenges as the organization evolves and innovates.

### ***Potential Course Content / Menu of Options***

A comprehensive leadership development course focused on effective communication, being people-centric, growing resilience, fostering innovation, and enhancing management capabilities should cover a wide range of topics to ensure leaders deeply understand these critical issues and workplace competencies, leveraging the Action Learning Project to demonstrate and model the learning in their leadership roles.

Informed by the discovery and needs assessment phases, our team, in partnership with Albany DoH, will establish learning objectives and prioritize topics to be covered in the customized, experiential learning curriculum, including a mix of theory, practical skills, and real-world application to prepare leaders for success. Additionally, ongoing support and resources should be available to reinforce learning and promote lasting change.

As food for thought, the following are examples of possible topics related to each modules' subject matter for consideration:

#### **Effective Communication:**

- *Foundations of Clear Communication*
- *Crafting a Vision Statement*
- *Oral and Written Communication Skills*
- *Meeting Facilitation*
- *Describing Populations and Interventions*
- *Communicating Evidence and Research*
- *Metrics and Evaluation Communication*
- *Feedback and Continuous Improvement*
- *Ethical and Inclusive Communication*

#### **Becoming People-Centric:**

- *Foundations of People-Centric Leadership*
- *Team Building and Development*
- *Conflict Management and Resolution*
- *Mentoring and Coaching*
- *Accountability and Performance Management*
- *Effective Communication in Leadership*
- *Networking and Relationship Building with External Agencies*



- *Inclusive Leadership and Diversity*
- *Delegation and Empowerment*
- *Change Management and Adaptability*

#### **Growing Resilience:**

- *Understanding Resilience*
- *Emotional Regulation and Stress Management*
- *Problem-Solving and Adaptability*
- *Maintaining Confidence During Adversity*
- *Building Personal and Team Resilience*
- *Learning from Failure*
- *Leadership in Crisis*
- *Developing Long-Term Resilience Strategies*
- *Ethical Resilience*
- *Resilience and Confidence in Communication*

#### **Fostering Innovation:**

- *Introduction to Innovation*
- *Fostering a Culture of Innovation*
- *Project Initiation and Management*
- *Process Improvement and Efficiency*
- *Risk Tolerance and Management*
- *Change Management and Leadership*
- *Creative Problem Solving*
- *Developing an Entrepreneurial Mindset*
- *Innovation through Technology and Tools*
- *Collaboration and Networking for Innovation*
- *Sustaining Innovation Over Time*

#### **Enhancing Management Capabilities**

- *Fundamentals of Management*
- *Process Establishment and Improvement*
- *Goal Setting and Target Management*
- *Project and Task Management*
- *Budgeting and Financial Management*
- *Time Management and Scheduling*
- *Resource Allocation and Optimization*
- *Risk Management in Project Execution*
- *Team Management and Motivation*
- *Monitoring and Reporting Progress*
- *Deliverable Quality Assurance*
- *Stakeholder Communication and Management*

## ***Sustaining Leadership Development and Organizational Learning***

For select participants, group work may lay the foundation for 1:1 coaching (tying own case and self-assessment feedback together with a fully fleshed out action plan to address an identified leadership challenge.) Coaching can also be targeted to assist with specific organizational challenges requiring the exercise of leadership competencies and support for the development of these competencies in others.

Potential areas of focus for continuous learning can include:

- *Managing change and risk*
- *Influencing without authority*
- *Enhancing effectiveness when facing complex business challenges*
- *Supporting diverse workplace cultures and intergenerational teams*
- *Navigating difficult conversations and feedback*
- *Executive presence*
- *Work-Life integration/balance*
- *Other subjects of relevance to participants identified needs.*

## **SECTION V**

### ***Cost Proposal***

Cora Group believes that Albany DoH's Comprehensive Leadership Course will positively impact its people and organization. It also provides an opportunity for a M/WBE firm to be part of this vital work to develop relevant content and contribute to its senior leadership's success.

We acknowledge the project has a maximum budget of \$150,000. For your consideration, we have created a potential project budget based on our current understanding of the scope of work as detailed above and how it fits into this budget framework. Tempered by our conservative assumptions, we estimate the following investment by phases for the scope of engagement outlined above inclusive of operating expenses:

<b>Phase</b>	<b>Cost</b>
0   Planning, Research, Discovery and Alignment (1 Month)	\$16,640
1   Needs Assessment (1 Month)	\$18,720
2   Course Development (3 Months)	\$42,380
3   Course Delivery (12 Months)	\$55,440
4   Evaluation and Continuous Improvement (Concurrent with Phase 3)	\$10,920
5   Close Out (1 Month)	\$5,900
<b>Projected Total</b>	<b>\$150,000</b>

We look forward to further discussions to align both timeline and budget to Albany DoH's vision for the project and the learning and development needs of its personnel. We appreciate this opportunity to propose how we can partner with Albany DoH to implement this significant and vital project for its people.

### ***Why Cora Group***

Our select team of experienced organizational development (OD), curriculum design, and learning and development practitioners will closely partner with Albany DoH to create its ***Comprehensive Leadership Course***. Working with us will benefit your organization in the following ways:

- **Expertise in Organizational Dynamics:** As OD practitioners, we specialize in organizational behavior, change management, and human resources and are skilled in understanding the intricacies of organizational structures, cultures, and dynamics. We deeply understand how organizations function and can tailor leadership development programs to align with Albany DoH's unique needs and goals.
- **Customized Solutions:** We can assess Albany DoH's specific challenges, culture, and goals and design a leadership retreat experience that addresses these issues. We create tailored solutions that are not one-size-fits-all. Rather, our interactive exercises intentionally align with your organization's context so that participants experience them as relevant to their jobs and situational demands.
- **Evidence-Based Practices:** We are well-versed in the latest research and best practices in leadership development. We can incorporate evidence-based methods into the learning experience, ensuring it is grounded in the most current and effective approaches.
- **Objectivity:** As an external organization, we can bring an impartial perspective to the process. We can identify organizational blind spots and challenges that internal staff may overlook due to their proximity to the situation.
- **Experience in Facilitation:** We are skilled facilitators who can create a supportive and engaging learning environment. We transparently manage group dynamics, encourage open discussions, and see that participants get the most out of their program experience.
- **Continuous Improvement:** We have processes for gathering feedback and evaluating the program's effectiveness. We can use this feedback to make necessary adjustments and improvements to the course content, ensuring the learning experience remains relevant and impactful.
- **Change Management Expertise:** Leadership development often involves organizational change and vice versa. We can help guide Albany DoH's key change agents and leadership to learn how to help their people navigate and embrace the change process.
- **Cross-Functional Perspective:** We can work across various departments and levels within your organization, ensuring that leadership development efforts are integrated and aligned with overall strategic objectives.

In summary, our team is well suited to create a leadership learning experience that can enhance the quality and impact of Albany DoH's leadership development efforts. Our expertise, objectivity, and tailored approach can help your organization develop its leaders to more successfully adapt to changing needs and challenges. This will promote the agency's capacity to respond effectively and sustainably over the years to come.

## **SECTION VI | Mandatory Documentation**

### **PLEASE SEE DOCUMENTS UPLOADED SEPARATELY.**

#### **Attachment A | Non-Collusive Bidding Certificate**



Attachment A\_Non-Collusive Bidding Certificate.pdf

#### **Attachment B | Proposer Acknowledgement**



Attachment B\_Proposer Acknowledgement.pdf

#### **Attachment C | Vendor Responsibility Questionnaire**



Attachment C\_Vendor Responsibility Questionnaire.pdf

#### **Attachment D | Iranian Energy Divestment Certification**



Attachment D\_Iranian Energy Divestment Certification.pdf

#### **Attachment 1 | Albany County Proposal Form**



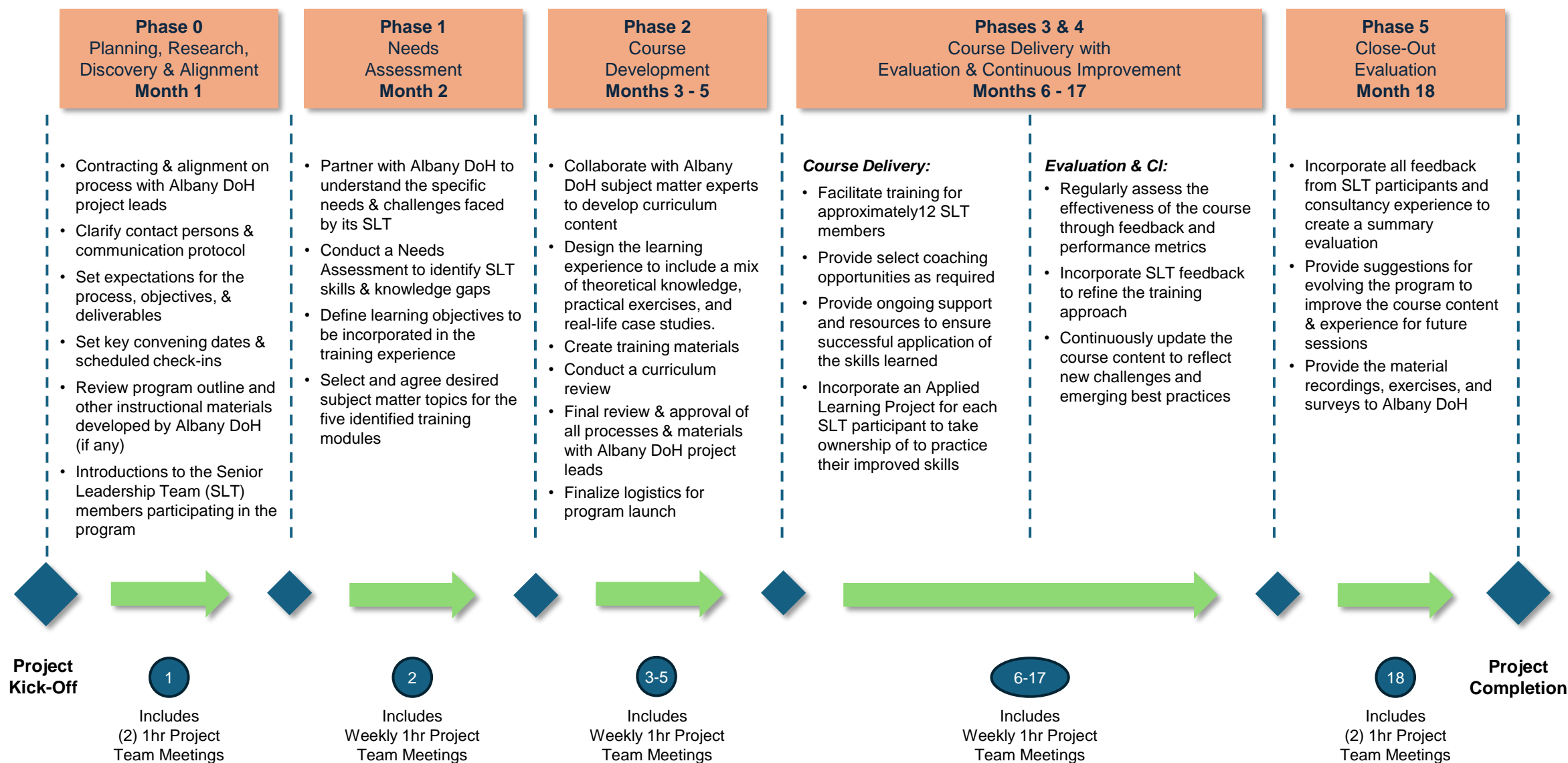
Attachment 1\_Albany County\_Proposal Form.pdf

#### **Attachment 4 | Albany County Non-Federal Entity Contract Provisions**



Attachment 4\_Albany County\_Non-Federal Entity Contract Provisions.pdf





See 12-Month Course Delivery Timeline Roll-Out

# 12-Month Course Delivery Timeline Roll-Out

