Date

Teresa Reilly
Director, EPMO

Georgia Technology Authority

47 Trinity Ave, SE

Atlanta, Georgia 30334

Dear Mrs. Reilly:

On behalf of Vendor Name, I would like to submit a Staffing Change Request for your review and approval. The request is for a change in the Position Name position for the Agency Name and Project Name

Currently, the project name vendor is anticipated to start work in Month, Year. After a transition period of at least one week at no cost to the State of Georgia, billable Type of Service services will begin on Date, to plan for the service activities, prepare for Name of Phase Phase kick-off communications, reengage stakeholders, and review and update Services.

In the table below please find rationale and justification for the proposed staffing change.

| **Question** | **Yes/No** | **Detail** |
| --- | --- | --- |
| For which project is the requested staffing change? |  |  |
| For which position is the requested staffing change? |  |  |
| What is the name of the new resource? |  |  |
| What is the name of the resource is he/she is replacing? |  |  |
| What is the reason for this resource change request? |  |  |
| Does this resource meet the resource and project qualifications as described in the original award letter? |  |  |
| Will this resource bill the same number of hours to this project? |  |  |
| Will this resource bill the same number of onsite hours to this project? |  |  |
| Does this resource fit within the price thresholds as stated in the original award letter? |  |  |
| Has North Highland taken any extra measures to ensure this transition is successful? |  |  |
| Does this change in resources honor the intent and integrity of the original award letter? |  |  |

Please let me know if you have any questions regarding this staffing change request. If possible, we would like to receive your written approval of the staffing change by or before close of business, Date, so that we can secure new resource name for the project.

Thank you for your time and consideration of this request.

Sincerely,

Vendor Representative

Vendor Name

Staffing Change Approval

The Georgia Technology Authority (GTA) approves the staffing changes requested on September 4, 2019, in connection with North Highland’s Contract with GTA pursuant to Statement of Need 9800-002520 and Contractor’s Statement of Work for the Project Name and PO information

GEORGIA TECHNOLOGY AUTHORITY

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: Teresa Riley

Title: Director, EPMO

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Becky Jarrell – Qualifications and Experience**

Becky Jarrell is proposed to replace Brendan Smith in the OCM Lead position. This position is within the ITPAS Subject Matter Expert resource category.

| **BECKY JARRELL** | **Role: OCM Lead** |
| --- | --- |
| Becky Jarrell has over 25 years of experience as an Organizational Effectiveness and Change Management professional. Her specific area of expertise is helping organizations prepare their people for large-scale corporate change, including communication, training, sponsorship, and stakeholder adoption. She also has specialized in leadership development for executives who champion change in their organizations.  |
| Examples of significant engagements:* Served as Enterprise Program Management Office Change Lead to support multiple initiatives for large professional services organization. Worked with multiple internal project teams and C-suite leadership for change management and communication planning for new operating model and related organizational changes. Also managed the change communications for compliance to European Union’s General Data Protection Regulation, internal policy changes, new recruiting candidate assessment tool, affiliate management processes, and other initiatives. Provided guidance to training team for Workday and Salesforce rollouts.
* Created an Enterprise Reporting Center of Excellence for a large professional services organization. This cross-functional team was chartered to ensure that the key enterprise reports (Power BI) are accurate, clear, and that they help business teams make decisions and take action. Included team creation, development of training assets (Enterprise Reporting 101 and a series of “Quick Look” five minute videos), and communication campaign to drive awareness of new Center of Excellence.
* Led Change Management communications for SAP migration program for a leading healthcare IT company. Analyzed stakeholders, identified key change impacts, helped facilitate weekly stakeholder sessions with IT project team to involve key business users and Finance Center of Excellence subject matter experts. Coordinated a blended, multimedia communications approach including websites, live events, demos and give-away prizes, walk-in support labs, and internal marketing collateral. Created executive speeches and coached client executives for presentations.
* Conducted instructional design review and training strategy for the rollout for a new mobile Hours of Service device for drivers and dispatchers for a large trucking company as part of the FMSCA “Electronic Logging Device Mandate”.
* Led the Change Management, communication, and training design and development for multiple systems changes (Oracle, new repair management system, new processes for services repair depot and warehouse) related to new acquistion for the Global Services division of a major hardware manufacturer.
* Led Organizational Effectiveness for the Integration Center and fulfillment warehouse of a large technology hardware integrator. Created new organization structure and supervisory role. Provided on-going leadership development and coaching for cohort of 13 new managers, including facilitating leadership workshops, coordinating vendor training and customer tours, and leading group through Lean/Six Sigma Green Belt certification. Created job aids to standardize processes and enable better on-the-job training for new employees, including partnering with Georgia Tech Supply Chain and Logistics Institute. Implemented a “Voice of the Customer” program to improve communications between the center and their internal customers. Administered DISC assessments and communication training for entire Integration Center staff, as well as internal sales operations. Implemented an in-depth, hands-on “Camp Cabot Experience” for internal sales reps to learn about warehouse and integration center operations and the impact of their jobs on downstream operations.
* Led Change Management for creation of a Business Intelligence Competency Center for a leading healthcare IT company. Conducted stakeholder management, instructional design/delivery, communication, and organizational design of a Business Intelligence Competency Center to support and sustain a new self-service BI tool. Created a SharePoint portal of training resources including job aids, short videos, and overview of BI tool capabilities. Created a Super User Academy program and certification process for Super Users.

 * Facilitated numerous “Transformational Leadership” workshops for a large federal government healthcare organization and a variety of other clients. Served as faculty mentor and Subject Matter Expert for 25 other facilitators. Designed and facilitated multiple “Change Academies”, which were a blended approach of training on Change Management concepts and action-based workshops to kickstart various strategic planning initiatives within the organizations. Worked with all levels of the organization, including senior leadership, mid-level managers, and high-potential employees as part of several cohort-based Leadership Development programs.
* Facilitated other leadership and communication workshops for variety of clients. Courses include Courageous Leadership, Powerful Presentations, Achieving Meeting Results, Managing Your Team Through Change, Managing Yourself Through Change, Covey’s Seven Habits of Highly Effective People, Covey’s First Things First, and many others. Conducted over 100 one-on-one executive presentations coaching sessions.
* Developed and implemented talent development programs for a large professional services firm. Programs included mentoring, retention, morale, quality of work life, performance evaluation/career planning. Responsible for managing the firm’s Core Values Survey and leading initiatives to improve results. Acted as program manager for multiple initiative teams.
* Managed the Training Department for the Southeast office of a large professional services firm, including vendor training and orientation for 160 new and experienced hires annually.
* Author of new ***POW-erful Meetings: Strategies, Tips, and Tools*** book (to be released in October 2019 via Little Leaps Press).
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| **Education:**[University of Georgia, Terry College of Business, BBA, Management Information Systems](https://www.linkedin.com/school/18192/?legacySchoolId=18192) | **Certifications:**Prosci Change Management Lean/Six Sigma Green BeltTTI Success Insights (DISC, Behaviors, Driving Forces)Accenture Leadership & Personal Development certification (including Covey 7 Habits)**Memberships:**Association for Change Management ProfessionalsLions Club (International Youth Exchange Chair, Atlanta Board Member, Club Secretary) |

**Brendan Smith – Qualifications and Experience**

Brendan Smith previously held the OCM Lead position on the EVV OCM Services Project. The project was placed on hiatus for six months, and Brendan Smith is no longer available to fill this position.

| **BRENDAN SMITH, MPA, CMAP** | **Role: OCM Lead** |
| --- | --- |
| Brendan is a consultant with the North Highland Company. He has over 24 years of consulting experience and is an expert in the fields of change management, organizational design, transformation, organizational assessment, and strategy. Brendan has designed and led multiple large-scale organizational change management and transformation initiatives over his career across domains including human resources, acquisition/purchasing, facilities management, and information technology and in industries such as government, healthcare, defense, transportation, aerospace, chemicals, and energy. |
| Examples of significant engagements: |
| * For an oil field services company, Brendan led the organizational change management effort for a worldwide human resources transformation. In this role, he analyzed stakeholders, assessed the organizational climate, developed a Change Management strategy, and secured C-Suite leadership endorsement for the approach. Brendan implemented that change strategy for the seamless companywide launch of five concurrent change initiatives. He coordinated leadership messaging that fostered alignment and underscored “one voice” communications across the organization. This effort successfully migrated 1,200 employees into a new global workforce company, achieving objectives of shared-services, legal compliance (avoiding significant tax penalties), and operational efficiency (reducing operating costs).
* For a Northeastern public transit agency, as part of the organizational change management effort, Brendan led an audit of internal decision-making, governance, and organizational structures. He conducted numerous internal and external stakeholder interviews, benchmarked best practices with peer transit organizations, and prepared a detailed assessment of organizational shortcomings. He prepared corresponding recommendations for each issue that were reported to the state Department of Transportation and the Governor for implementation. Brendan also led the development of an implementation plan, a change readiness assessment, and key message platform.
* For a state Department of Transportation, Brendan led the design and stand up of a new office dedicated to the introduction of technology to help address transportation requirements. In this role, Brendan designed the new organization structure for the office, wrote position descriptions and reporting responsibilities, and he designed and documented new business processes. This office is the first of its kind in state government and Brendan helped the client create this new capability from the ground up. Brendan also led, designed, and implemented the change management strategy to help institutionalize these new processes and structures in the Department.
* For a major U.S. airport, Brendan led the assessment of their Operations business unit to determine root causes of low morale and labor-management tensions. For this cultural assessment, Brendan designed and administered a web-based survey instrument, conducted face-to-face stakeholder interviews, and designed a focus group protocol. Current state findings were documented, and a set of recommendations prepared for airport leadership.
* For a state government agency, Brendan centralized budget and finance employees from among various programs and sections of the department into a newly designed, enterprise CFO office. This was accomplished in a manner that was net neutral for the organization in terms of labor costs and headcount. The project was completed ahead of schedule and endorsed for implementation by the Commissioner of the agency. The work entailed detailed interviews with internal leadership; analysis of workload and roles; and development of Conceptual Design and then Detailed Design for the centralized structure. To accompany the design, Brendan created an implementation roadmap with a project management plan, change management strategy, and communication plan to support implementation efforts.
* For a super major energy multinational, Brendan led a consulting team that analyzed and designed a new centralized process for managing reliability and maintenance data for the firm’s computerized maintenance management systems (CMMS). This streamlined and centralized process for data quality and stewardship is estimated to cut required resources by more than 50 full-time equivalents, and to complete data cleansing and enrichment by a decade. The new organizational design included staffing requirements, time estimates by scope of work, and a dynamic resourcing model that could model different resourcing scenarios.
* For a state government agency, Brendan led a rapid organizational assessment and developed guiding principles for the redesign of the organization, a new functional model for the agency, and a recommended path forward for the implementation. Brendan reviewed organizational documentation, conducted multiple internal and external stakeholder interviews, and facilitated an organization-wide employee survey to collect insights for the redesign. The new design remedied a dysfunctional organization structure (addressing performance) and did so without resulting in any adverse employment actions.
* For the merger of 10 U.S. Army information technology offices into three, streamlined organizations (including one totally new agency), Brendan led, designed, and delivered the program management and stakeholder engagement structure to drive the reorganization efforts. This entailed defining organizational charters for new roles, communicating between organizations, arbitrating disputes, clarifying interfaces, and fostering work across organizational silos. His efforts leading the program management office resulted in on-time completion and saved the client $6M annually in manpower.
* For a super major energy multinational, Brendan led a stakeholder analysis and organizational review to develop a redesign of a departmental organization structure. This organizational redesign was adopted by the Vice President client and helped configure the department to address new roles and responsibilities. Furthermore, the recommended redesign streamlined the organization by reducing Director-level positions (savings substantial labor costs) while clarifying roles and adding career paths for staff.
* For the petroleum unit of a multinational resources firm, Brendan supported the transition of the purchasing department to new business process and new technology solutions. Brendan facilitated employee engagement efforts and provided training on new operating procedures.
* For a petrochemical firm, Brendan supported a diagnostic of internal purchasing and accounts payable business processes and analyzed the use of SAP in support of those business units. Brendan helped develop 22 recommendations for the organization that would address shortcomings identified in the diagnostic and to help enhance operational efficiencies. These recommend changes were presented to C-Suite leadership for endorsement.
* For the top-to-bottom reorganization of an Air Force procurement agency, Brendan helped define the future-state vision, design the new organizational model, and document interfaces between new departments and with external vendors. The strategy and approach were approved by senior leadership and Brendan stood up a program management office to drive the transformation over a 12 month period.
* For a U.S. Army acquisition agency, Brendan supervised the organizational design and process development for the agency’s customer engagement and requirements analysis department. Brendan then served in an ongoing consultative role as a contracted manager for that organization.
* For the establishment of transformed business processes for the U.S. Air Force, Brendan designed and led implementation of a communication tool kit for over 150 squadron commanders. This effort resulted in outreach to over 60,000 Air Force personnel and is now helping to facilitate the 20% reduction in installation footprint/costs.
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| **Education:**Bachelor of Arts (History and Political Science,) Villanova University, Villanova, PAMaster of Public Administration (MPA), (concentration in management) University of Texas at San Antonio, San Antonio, TX | **Certifications:**Prosci Change Management RIVA Focus Group Moderation Strategic Planning and Executive FacilitationChange Management Advanced Practitioner (CMAP) Graduate Certificate**Memberships:**Association of Change Management Professionals (ACMP) MemberSociety for Human Resource Management (SHRM) MemberSecret Clearance (DoD) Inactive |

**Susan Edwards - Qualifications and Experience**

The original award letter was based on Susan Edwards’ OCM qualifications, with respect to the OCM Lead role.

| **SUSAN EDWARDS** | **Role: OCM Lead (Originally Proposed)** |
| --- | --- |
| Susan Edwards is a Change Management Leader and Project Manager with the North Highland Company. She has 15+ years of experience working with sponsors, line managers, and stakeholders to enable their capabilities for change and transitions within business processes, systems, and the workforce. Specific areas of expertise include: requirements gathering, strategy and vision, communications, learning and development, process improvement, corporate trainer, and professional coach. |
| Examples of significant engagements: |
| Project Manager, National Insurance Provider * Led a largely remote team to onboard a new client in a tight timeline. The work streams were planned to incorporate the client onto multiple newly automated enterprise platforms and reporting requirements: Accounting, IT Developers, Quality Assurance, Data Analysts, Business Analysts, Actuary, Reinsurance, Business Development, and Leadership
* Facilitated requirement sessions (data mapping, reporting, and processes), visioning and planning sessions, and ongoing team meetings
* Provided ongoing reports to business and PMO leaders on project costs, resources, and deliverable timeline
 |
| Change Management Lead, Large Cable, Voice, and Video Provider* Partnered with the PM to assess, plan, and lead change management activities to implement a new operating model across 11 markets nationwide and create a Center of Excellence. Work stream activities and deliverables included leveraging the vision for operations and customer experience to develop stakeholder journeys and communication plans for the sponsor, market leaders, managers, and a newly transitioned organization
* Coached the Training and HR work streams to design and deliver their deliverables based on the stakeholder journeys
* Facilitated the Center of Excellence’s new leader onboarding retreat which was intended to define an aligned management model for employees’ “ways of working” and performance
 |
| Change Management Lead, Global Beverage and Marketing Company* Assigned to implement Workday for the plant manufacturing division
* Served as liaison between the program, functional business leaders, and plant leaders
* Assessed and planned stakeholder engagements, regional communications, training deployment, and the Change Network across 21 plants which would impact ~6,000 employees
* Facilitated leader meetings weekly with the Global HR Director and plant managers to align on the HCM objectives which included transforming the culture, changes to the HR processes in Workday, and employee roles
 |
| Change Management Lead, Global Consumer Goods Company* Partnered with the Project Manager to lead two mergers and acquisition projects where global business operations, products, and employees had to transition within a tight line to the company’s SAP (HCM, Financials, Procurement, and Supply Chain) platform, Salesforce instance, and warehouse management system (PkMS) and processes
* Conducted assessments (as-is operating model used for transition planning), communications (developed and executed for internal and external stakeholders)
* Managed the training deployment team to deliver implementation training and eventually, ongoing support with full indoctrination to the company’s culture
 |
| Change Management Lead, Global Consumer Goods Company* Partnered with warehouse leaders to lead a strategic realignment of supply chain operations for two business segments with impacts to 550 employees and 12 critical processes. The projects entailed speed-to-adoption (hands-on) deliverables for knowledge transfer, process improvement, champion and process certifications, communications, training, quality and audit processes.
* Delivered change management training to Managers and Supervisors to enable the warehouse’s change management maturity model for future changes geared towards shipping performance targeted for $35 million monthly and $125 million monthly
 |
| Change Management Lead, Global Consumer Goods Company* Partnered with a functional business leader and R&D leaders to implement an ERP project management platform which aligned 270 domestic and global employees with enhanced tools for 300+ projects. The implementation enabled C-Suite leaders to have access to real-time project information and business intelligence tools.
* Managed the implementation training, developed and delivered communications, and was the SharePoint administrator for the business
 |
| Program Manager, State Higher Education Institution* Served as a strategic partner between Enterprise IT, Business Analysts (across all functions), the Office of Organizational Development, and HR to plan and deliver training programs for enterprise systems (HCM, Financials, Procurement, Grants and Contracts, Student Management) – wide range of projects from software and system implementations to product upgrades
* Conducted business impact assessments
* Developed stakeholder engagement plans
* Developed and delivered training
* Developed and managed a champion user group of SMEs to deliver training and serve as local coaches to end users
* Received the 2011 Champion of Learning award from the Association of Training and Development
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| **Education:**BA, English Literature, Georgia State UniversityMaster’s of Arts, English Education, Clark Atlanta UniversityPhD, Educational Policy Studies, Georgia State University, | **Certifications:**Change Management Professional with Prosci, Inc., Professional Coaching with InsideOut Development, Inc. |