

Meeting 5/6/19



February 19, 2019

Dr. Barbara Sharief  
Commissioner  
Broward County Commission  
District 8  
115 South Andrews Avenue, Room 437C  
Fort Lauderdale, FL 33301

Re: Clarification and Concerns about HR Procurement Process for selection of Trainers and Training Companies

Dear Commissioner Sharief:

In following up from our brief discussion at the JM Family African American Achievers reception earlier this month, I wanted to formally follow up and request an appointment to meet with you to see insight as it relates to the above.

This document, which I do hope is shared represents my experiences with the Human Resources Department and my reasoning for meeting with you. It is my intent to fully understand why in 25+ years, that my firm has attempted to introduce our value proposition to the County, we have either been shunned by our Direct Buyers or have had to go through the County Administrator's office to secure a meeting with Human Resources.

My firm, CMA Enterprise Incorporated has been in existence for nearly 29 years and have been engaged by corporations like Burger King, Mercedes Benz, Florida Power and Light, Noven Pharmaceuticals, for example. We are a preferred Supplier in Consulting and Training Pools in Miami Dade County, Maricopa County, State of Massachusetts, City of Miami, Polk County, City of Miramar, and State of Oregon. But to my surprise, in 25 years, I have not been able to get clarification on why CMA is not "qualified" to do business with Broward County.

I understand that the County HR Department allegedly procures Trainers through the FAU Institute of Government, but having called their office on numerous occasions and even met with the Executive Director, no one can tell me how or if there is an established pool of professionals or the selection process.

207 Laurel Oak Lane, Suite B  
Davie Florida 33325  
Ofc: (954) 476-3525 Fax: (954) 370-0803  
[www.cma-ent.com](http://www.cma-ent.com) [cma@cma-ent.com](mailto:cma@cma-ent.com)



My topics of discussion for the meeting are as follows...

How is it that the HR Department for the County has not official guidelines for procuring services and all other departments do?

Why does the County not have a formal pool of Professional Trainers and/or Consultants like most other Municipalities and County Governments that allows for a diverse pool of professionals?

How are firms and individuals currently doing work for the County being selected and what is the criteria and source?

Why is it that a firm like CMA has so much of a challenge in seeking out opportunities with the County, but can serve clients across the country with no problem and with great success?

How is the County currently tracking its spend for Training and Professional Consulting and is it inclusive of Diverse and Small and Woman Owned Businesses?

Why does the county prefer to pay at a minimum 25% over the actual cost of the service versus buying direct? And if it is buying direct, is the County's procurement process being followed without exception?

While I am a squeaky wheel, there are others who have experienced this same treatment once we leave the protection of Mr. McDonald's office. I am simply another voice in the choir singing the song of ... "Make the County Procurement a Level Playing Field." Because it presently is not.

It is my position that the members of the commission for the County be able to ask the really hard questions. All I am able to do is put the questions on the table.

Maybe through your office I will be able to solve this mystery. I look forward to hearing from your office as it relates to a mutually agreeable time to meet. If he is able, I would like Mr. McDonald to attend the meeting since he knows the history and has worked diligently in my behalf in the wake of unusual procurement practices that change with my inquiries.

Respectfully

A handwritten signature in cursive script, appearing to read 'Gail P. Birks', is written over a faint, circular watermark or stamp.

Gail P. Birks, EMBA, LMBB, IATA  
President/CEO  
Mediator

207 Laurel Oak Lane, Suite B  
Davie Florida 33325  
Ofc: (954) 476-3525 Fax: (954) 370-0803  
[www.cma-ent.com](http://www.cma-ent.com) [cma@cma-ent.com](mailto:cma@cma-ent.com)

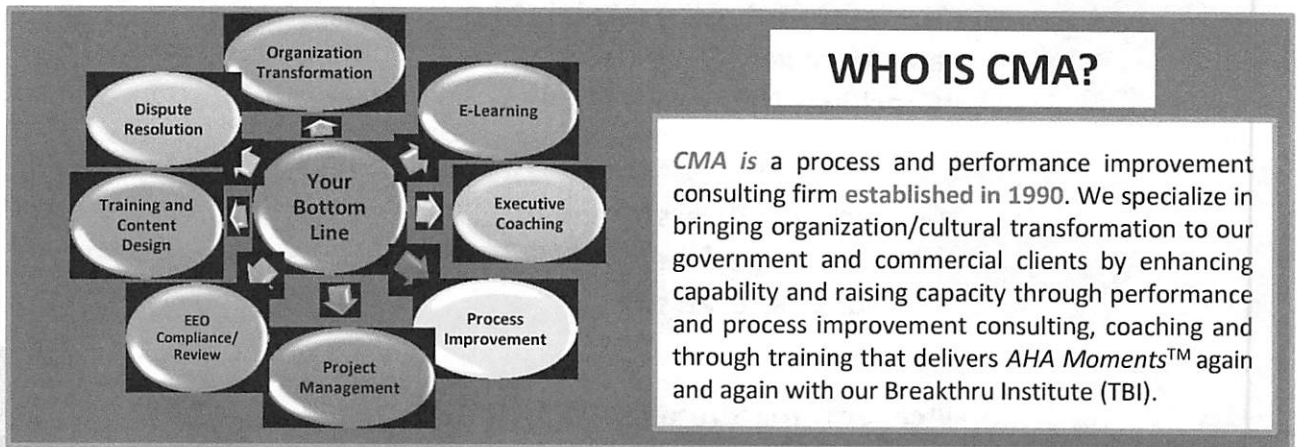


**"Organizing Your Business  
Puzzle since 1990"**

**CMA Enterprise Incorporated**  
 dba *The Breakthru Institute*  
 207 Laurel Oak Lane, Suite B  
 Davie, FL 33325-6725  
 Office: 954-476-3525 FAX: 954-370-0803  
 Cell: 786-423-0155  
[cma@cma-ent.com](mailto:cma@cma-ent.com) \* [www.breakthruinstitute.biz](http://www.breakthruinstitute.biz)



## CMA CAPABILITY STATEMENT



### WHO IS CMA?

*CMA is a process and performance improvement consulting firm established in 1990. We specialize in bringing organization/cultural transformation to our government and commercial clients by enhancing capability and raising capacity through performance and process improvement consulting, coaching and through training that delivers *AHA Moments™* again and again with our Breakthru Institute (TBI).*

### WHAT WE DO?

- Facilitate Performance and Process Improvement Initiatives
- Curriculum Design and Modification
- Lean Six Sigma (Re)Certification Training and Project Coaching
- Leadership and Executive Coaching
- Project Mobilization and Management
- Orchestrate organization and cultural transformation,
- Diversity and Inclusion Training and Consulting
- Training and Facilitation Services (classroom and online, blended),
- Maximize human resource talent through HR Strategic Planning and Development Consulting
- EEO Compliance Technical Assistance and Training
- DiSC Personal and Group Culture Assessments
- Product Licensing Agreements

### COMPANY DATA

Duns: 802944728  
 CAGE Code: 1C7E5

Primary NAICS CODES: 541611, 541618, 541614, 541199, 541612, 541990, 541490, 561110, 611710, 541612, 874827, 611430

UNSPSC Codes: 601016, 601017, 801015, 801016, 801115, 801615 811415, 811416, 861018, 861115, 861116, 931420

SPC (SIC) Codes: 6615, H169, H199, 6930, H969, K069, U001, U002, U004, U005, U006, U008, U009, U010, U012, U099, R431

- An ISAAC and CSSC Certified Lean Six Sigma organization
- Certified MWBE, DBE SBE, CDBE ACDBE, MWOSB, WBE, WOSB



Gail P. Birks, EMBA, LMBB, IATA  
 President/CEO





THE  
BREAKTHRU  
INSTITUTE



Facilitating your

**AHA!!! MOMENTS**

[www.breakthruinstitute.biz](http://www.breakthruinstitute.biz)

Call 954-476-3525 for a Quote



**Academy for Process Improvement  
(Lean Six Sigma (re)Certification)**

All levels



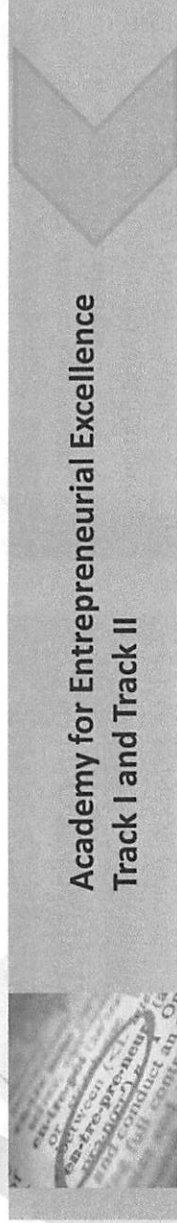
**Academy for Leadership  
and Managerial Excellence  
(Coaching, Track I and Track II)**



**Academy for Diversity and Inclusion  
(Cultural, Organization, Race Relations,  
and Supplier Diversity)**



**Academy for Strategic Planning and  
Implementation**



**Academy for Entrepreneurial Excellence  
Track I and Track II**



**Academy for Board Governance and  
Enterprise Risk Management**



**Practitioners' Academy of Excellence  
(Train the Trainer)**

**Ask up about our Online Ala Carte Excursions!**





## CURRENT and PAST CUSTOMERS

(partial listing)

Our Client List includes...

### Industry

Grant Thornton LLC  
Bi-Lo Holdings, LLC.  
Tyco International  
Noven Pharmaceuticals, Inc.  
Altegra Health  
Mercedes Benz U.S. International  
Burger King Corporation  
Ryder Systems, Inc.  
Visa International  
Novozymes North America, Inc.  
Motorola  
City Furniture  
Vertilux, LTD  
Gibraltar Private Bank and Trust  
Dickens Consulting Group

### Utilities

Florida Power and Light  
Orlando Utilities Commission  
Tampa Electric Company  
Verizon Wireless - Call Centers  
TECO

### Hospitality

The Ritz Carlton  
Hotel Sofitel

### State Government Agencies

State of Florida  
Department of Children and Families  
Florida Department of Education (Schools of  
Choice- Charter Schools)  
South Florida Water Management District  
School Board of Polk County

### Public Health

Broward Health

### Municipalities

Polk County, Florida  
Lee County Florida  
Palm Beach County  
Miami Dade County  
Broward County  
Hillsborough County  
Town of Davie  
City of Lauderdale Lakes  
City of Lake Worth  
City of Hallandale Beach

### Public Education

Broward College  
Miami-Dade College  
University of Phoenix  
Tulane University  
Tennessee State University  
Bethune Cookman University

### Non-Profits/Foundation

Community Foundation of Broward  
Fannie Mae Foundation  
Broward Community Foundation

### Federal Government

Federal Executive Board (South Florida  
Office)  
U.S. HUD  
V.A. Medical Center

# Background Information for Meeting Request



CMA Enterprise Incorporated is an established boutique Advisory and Training Company that specializes in improving processes and performance for our clients in the Government, Corporate and Public sectors. We have served locally, regionally, and nationally. Our leadership and company have received numerous accolades for our professionalism, innovation and the sustainable results. Over 90% of our business has been by word of mouth and/or Client Referral.

## **CONCERNS AND NEED FOR CLARIFICATION**

The need to raise the platform of the concerns and need for clarification noted in my cover letter to you are not my battle alone. I just felt the need to increase awareness about business practices that are counter to those marketed to the business community by the County. We have been “locked out” of the County’s procurement process for more than 25 years with no clear explanation as to why this position has been taken. Our presentation has always been professional and innovative hence our partial client list shared. We have also sought people inside your organization like Sandy Michael McDonald ask why we are not doing business with the County. Well, it is not because we have not tried to do so.

Our history of soliciting Broward County is a long journey, but here is the “Executive Summary.”

- CMA first approached the County’s HR Department when the late Susan Delciopia ran the Training Division. While she was pleasant, and acknowledged our services, still opportunities to propose our services was denied.
  - CMA was told that the HR Department only procured its trainers from the Institute of Government at FAU and that we needed to take that route.
  - Some time past before CMA approached Ms. Delciopia again, this instance it was to introduce our Lean Six Sigma Academy. The intro was because CMA was getting calls from County Employees about getting certified in this discipline. This was shared with HR and Ms. Delciopa noted that she had not heard such stories. When asked if it was offered at the County, the employees noted it was not at that time. CMA fulfilled the request to certify and the employees paid for the training out of their own pockets. (approximately 6 years ago)
- FAU Institute of Government Executive Director, Sarah Shannon informed CMA that they did not meet with “outside” Trainers and Consultants even though the County said that this was their gateway to them. At that time in the mid 1990’s, the institute only used 4 trainers. Ms. Shannon refused to meet with me at that time.



- Fast forward, Ms. Delciopia unfortunately passed away and this position was given to her assistant, Ruby (not sure of her last name) who refused to meet with me, did not want to accept our capability statement and informed me that I should go the SHRM meetings and maybe I will meet my end user. She did not realize that she was my end user, but I did clarify that for her and that going to a dinner meeting to encounter the person I was speaking to on the phone did not make sense.
- Fast Forward again, I was finally invited to meet with Sarah Shannon with the FAU Institute of Government because a mutual government client told her that she wanted her to meet me. When we spoke to confirm the meeting, she informed me that she was only meeting with me because she was told by this client to do so. The request was unsolicited by CMA and driven by our Client.
  - Noteworthy is that the meeting with Ms. Shannon lasted 3 hours. Most of it was spent educating Ms. Shannon on what Six Sigma was and that most Government agencies were leaning towards it. She did not know what it was. The meeting went well and she asked me to speak with a municipality who wanted to learn about Lean Six Sigma. I also shared with her that I was getting calls from County Employees who were seeking certification.
    - CMA met with the municipality but the organization's desire for a custom course unfortunately did not match their budget.
  - **Ms. Shannon also shared that she charges the County 25% over what her trainers charge to the County as her fee.**
- Fast Forward, I was introduced to Sandy Michael McDonald, the County Director for Small Business and Economic Development, at a Presentation I did at a FAMBEO Conference in West Palm Beach. He was in the audience and experienced my training presentation. At the end of the session, Mr. McDonald asked me if I was doing business with Broward County, because he was not familiar with my company. I shared my story with him and he found it difficult to believe that the County was not doing business with CMA. We later met at his office to attempt to build a strategy to open doors for CMA. That was nearly 3-5 years ago.
- Fast Forward again, exhausted trying to meet with HR at the County, I scheduled a meeting with the County Administrator, Bertha Henry who introduced me to Gretchen Cassini who oversees these areas. It was mutually agreed that there may be some way to initiate some productive discussions in CMA's behalf.
  - Ms. Cassini and I had a great meeting, through her, I was able to get a meeting with the Assistant Director and the New Training Director, who up till that point would not willingly meet with me. During our meeting, she did comment on the lack of diversity in the trainers that she had been exposed to from FAU.
  - The HR meeting lasted about 30 minutes and the intent was to introduce CMA but to also state the business case that HR tends to select those who they know and have relationships with. CMA was interested in building a relationship with them. While there was follow up by CMA, HR has not been responsive.



- During the meeting, I shared that I was being contacted by County staff for six sigma training and wanted to introduce CMA's services for consideration. The staff acknowledged that they were unaware of this activity but still offered no sincere interest in opening a deeper dialogue with CMA's business solutions . They were polite, but it went nowhere after and Ms. Cassini routed me back to Mr. McDonald which was confusing.
- Fast Forward again, I was informed by Mr. McDonald approximately 2 years ago that the County's HR department was now doing six sigma training county wide. I asked him why CMA was not contacted to put in a proposal for the services, in light of the fact that we introduced it to the County and that we are not afraid of competition. It seems no solicitation was issued and we were not contacted by FAU who we educated on this product. Most important, since I have been repeatedly told that the County only procures from them. CMA is not an unknown entity at this point.
- Final Fast Forward, at a 2018 vendor outreach event in Deerfield Beach, I learned that the County brought in a facilitator from out of state to run the leadership retreat as per Mr. McDonald. We talked briefly about it and once again, I asked how was it procured He was not sure.

I could go on with other encounters that equate to unprofessional runarounds with me and my associates, and being deliberately excluded for the procurement process at the County in spite of being registered (several times), but I will leave that up to those who can truly make a difference such as yourself.