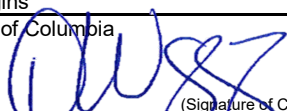


<b>AMENDMENT OF SOLICITATION / MODIFICATION OF CONTRACT</b>		1. Contract Number CFOPD-19-C-011B		Page of Pages	
				1	Attachments
2. Amendment/Modification Number 001		3. Effective Date See 16 C below		4. Requisition/Purchase Request No.	
				5. Solicitation Caption MRPTS Organizational Change Management (OCM) Services	
6. Issued by: Office of the Chief Financial Officer Office of Contracts 1100 4 <sup>th</sup> Street, S.W. Suite E610 Washington, D.C. 20024			7. Administered by (If other than line 6) Office of the Chief Financial Officer Office of Tax & Revenue 1101 - 4th Street, SW. Washington, DC 20024		
8. Name and Address of Contractor (No. street, city, county, state and zip code)  The Robert Bobb Group, LLC 975 F St., NW Carroll Square Suite 230 Washington, DC 20024 Phone 202 442 6499  Code _____ Facility _____			9A. Amendment of Solicitation No.		
			9B. Dated (See Item 11)		
			X 10A. Modification of Contract/Order No. CFOPD-19-C-011B		
			10B. Dated (See Item 13) August 07, 2019		
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS					
<input type="checkbox"/> The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended. <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) BY separate letter or fax which includes a reference to the solicitation and amendment number. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such may be made by letter or fax, provided each letter or telegram makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.					
12. Accounting and Appropriation Data (If Required)					
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14					
X	A. This change order is issued pursuant to Section 1.8 of the Contract				
	B. The above numbered contract/order is modified to reflect the administrative changes (such as changes in paying office, appropriation data etc.) set forth in item 14, pursuant to the DC Financial Responsibility and Management Assistance Authority.				
	C. This supplemental agreement is entered into pursuant to authority of:				
	D. Other (Specify type of modification and authority)				
<b>E. IMPORTANT:</b> Contractor <input type="checkbox"/> is not <input checked="" type="checkbox"/> is required to sign this document and return _____1___ copies to the issuing office.					
14. Description of Amendment/Modification (Organized by UCF Section headings, including solicitation/contract subject matter where feasible.) A. The purpose of this contract Modification is to: 1. The Contract is hereby amended to replace the Contractor's Business Process Re-engineering training with the Leadership Training Program per Attachment A, at no additional costs to the District. The Change Labs shall be conducted by July 31, 2020. 2. Sections B is hereby amended as per the Attachment B to the incorporate the requirement component and respective provisions to the contract due to the estimated number of months in the option years. 3. Section G is hereby amended to add Section G.7 in Attachment B. 4. All the terms and conditions remain the same.					
Except as provided herein, all terms and conditions of the document is referenced in Item 9A or 10A remain unchanged and in full force and effect.					
15A. Name and Title of Signer (Type or print) Patrick A. Bobb, Chief Operating Officer			16A. Name of Contracting Officer Drakus Wiggins		
15B. Name of Contractor <i>Patrick A. Bobb</i> (Signature of person authorized to sign)		15C. Date Signed March 18, 2020	16B. District of Columbia  (Signature of Contracting Officer)		16C. Date Signed 03/18/20

**ATTACHMENT B**

A. Section B below replaces Section B in the Contract.

**SECTION B**

**CONTRACT TYPE, SUPPLIES OR SERVICES AND PRICE**

**B.1 GENERAL INFORMATION**

The District of Columbia Office of the Chief Financial Officer (OCFO), Office of Contracts, on behalf of Office of Tax & Revenue (OTR) (“the District”) is awarding a contract to provide organizational change management (OCM) services in conjunction with the implementation of the Modernized Real Property Tax System (MRPTS).

**B.2 CONTRACT TYPE**

The District is awarding a Firm Fixed Price Contract with a requirement component.

**B.3 ALL-INCLUSIVE PRICING**

The stated Price Per Unit for each Contract Line Item Number (CLIN) shall be fixed, inclusive of all the Contractor’s direct costs, indirect costs, and profit; including travel, material, and delivery costs. The price shall include all costs associated with the services described in and required by the Contract. The Total Estimated Price shall represent the price ceiling, fixed fee, or not to exceed amount of the Contract.

**B.4 REQUIREMENTS CONTRACT**

1. The District will purchase its requirements of the services included herein from the Contractor. The estimated quantities stated in the Pricing Schedule reflect the best estimates available. The estimate shall not be construed as a representation that the estimated quantity will be required or that conditions affecting requirements will be stable. The estimated quantities shall not be construed to limit the quantities which may be required from the Contractor by the District or to relieve the Contractor of its obligation to fill all such requirements.
2. Services shall be ordered upon issuance of a detailed order in accordance with Section G.7.
3. The monthly price shall be a firm, fixed rate to provide all of the services required in Section C Scope of Work, including labor and material and all others the cost.

**B.5 PRICE SCHEDULE – FIRM FIXED PRICE**

**B.5.1 BASE YEAR**

CLIN	Item Description	Unit Price	Qty.	Total Price
001	Monthly OCM Services	\$133,375	12 Months	\$1,600,500

**B.5.2 OPTION YEAR ONE - REQUIREMENT**

<b>CLIN</b>	<b>Item Description</b>	<b>Unit Price</b>	<b>Estimated Qty.</b>	<b>Estimated Total Price</b>
101	Monthly OCM Services	\$133,375	12 Months	\$1,600,500

**B.5.3 OPTION YEAR TWO - REQUIREMENT**

<b>CLIN</b>	<b>Item Description</b>	<b>Unit Price</b>	<b>Estimated Qty.</b>	<b>Estimated Total Price</b>
201	Monthly OCM Services	\$110,131.21	12 Months	\$1,321,574.52

B. Section G.7 as follows is added at the end of Section G.

**G.7 ORDERING CLAUSE**

- G.7.1 Any supplies and services to be furnished under this contract must be ordered by issuance of delivery orders, task orders, or purchase orders by the CO. Such orders may be issued during the term of this contract.
- G.7.2 All orders are subject to the terms and conditions of this contract. In the event of a conflict between an order and this contract, the contract shall control.
- G.7.3 If mailed, an order is considered "issued" when the District deposits the order in the mail. Orders may be issued by facsimile or by electronic commerce methods.



ATTACHMENT A



Initial Training Strategy & Approach Addendum

# **Organizational Change Management Leadership Training Strategy & Approach**

Government of the District of Columbia  
Office of the Chief Financial Officer  
Office of Tax and Revenue

January 17, 2020



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# Introduction and Purpose



## Background

The Organizational Change Management (OCM) team, composed of members from The Robert Bobb Group (RBG) and KPMG, is engaged to provide organizational change management services to the Government of the District of Columbia Office of Tax and Revenue (OTR) in support of the Modernized Real Property Tax System (MRPTS), within the Modernized Integrated Tax System (MITS). At the request of the OTR executive team, the OCM team is tasked to design a leadership program to enhance the competencies and skills of the Real Property Tax Administration (RPTA) leaders.

This training strategy is an addendum to the Initial Training Strategy and Approach, which focused on the OCM Case for Change Training. The OCM Case for Change Training provided foundational knowledge on change for all RPTA stakeholders. The courses proposed in this document build on this foundational knowledge to assist leaders in facilitating and leading change within their business units.

The purpose of the Leadership Training Program is to equip management/supervisor-level employees within the Real Property Tax Administration (RPTA) with tools to effectively motivate and influence staff. Courses presented in the program will assist in improving critical skills necessary to lead staff to a clear future vision of operating within the MRPTS. In response to feedback received during the Stakeholder Analysis, eBrainstorming®, and Case for Change training, the OCM team will conduct leadership training focused on three key areas: communication, conflict resolution, and leading versus managing. In addition, this program will be complemented with Change Labs.

**Communication:** Communication is how we transmit and receive information that is critical to achieving an organization’s mission. When well-practiced, communication conveys direction and accelerates coordination. Poorly practiced, it exacerbates the already delicate task of marshalling collective talent.

**Conflict Resolution:** Conflict is a common and unavoidable part of life. It is typically seen as distracting at best, destructive at worst. Conflict should be understood as two opposing forces colliding. That collision creates an energy that can be harnessed in pursuit of an organization’s mission. Properly managed, conflict is an opportunity to lead.

**Leading vs. Managing:** The distinction between “leader” and “manager” is misleading. Everyone should be equally capable of leading and managing when the moment is at hand. Leading and managing are about functions, not people, and thus can be captured through analogies such as “leadership is to direction as management is to execution.”



## Approach

Training courses within the Leadership Program will cover each of the key development areas: communication, conflict resolution, and leading versus managing. This will further equip RPTA management-level employees to effectively lead staff through the transition to MRPTS.

**Leadership courses** will be facilitated by Dr. James Bailey and delivered in three sessions from mid-March 2020 through mid-July 2020. Each session will cover one course in one of the identified development areas: communication, conflict resolution, and leading versus managing.

**Change Labs** will be facilitated by members of the OCM team. The OCM team will conduct *up to three (3)* Change Labs during the duration of the MRPTS project.



**James R. Bailey** is Professor and Hochberg Fellow of Leadership Development at the George Washington University School of Business (GWSB), and a Fellow at the Centre for Management Development, London Business School. Dr. Bailey is the recipient of many teaching distinctions, including four GWSB Outstanding Faculty Awards. In 2006, he was named one of the world's top 10 executive educators by the International Council for

Executive Leadership Development. He has published over 50 academic papers and case studies, and is the author of five books, including the award-winning and best-selling *Organizational and Managerial Wisdom* and the forthcoming *Lessons on Leadership*. He has designed and delivered hundreds of executive programs for firms like Nestle, UBS, Conoco-Phillips, and Goldman Sachs, as well as several major law firms and the U.S. Congress. He is the past Editor in Chief of the *Academy of Management Learning and Education*, as well as the founder and Editor in Chief of the online magazine *Lessons on Leadership* ([lessonsonleadership.org](http://lessonsonleadership.org)) and the author of the *Psychology Today* column, *At the Helm*. Dr. Bailey has served as a dean, department chair, and program director during his 25-year academic and consulting career.



# Roles and Responsibilities

	<p><b>OCM Team</b></p>	<ul style="list-style-type: none"> <li>▪ Overall coordination, planning, and execution of training</li> <li>▪ Create training strategy and plan</li> <li>▪ Lead training courses and workshop sessions</li> <li>▪ Manage the delivery of training</li> <li>▪ Create course outlines</li> <li>▪ Develop course materials</li> <li>▪ Develop course evaluation and compile course evaluation results</li> </ul>
	<p><b>RPTA Management</b></p>	<ul style="list-style-type: none"> <li>▪ Attend training courses and ensure all supervisors and managers participate</li> <li>▪ Engage in activities presented during the course</li> <li>▪ Provide feedback on presented course content</li> </ul>
	<p><b>OTR Leadership</b></p>	<ul style="list-style-type: none"> <li>▪ Provide thorough and timely reviews of any training material</li> <li>▪ Support availability of resources to prepare and deliver training</li> </ul>



# Leadership Program Curriculum



<b>Description</b>	<p>The three-part leadership program is designed to provide front-line supervisors and managers skills that will enhance their ability to effectively lead teams. Through interactive discussions and exercises, participants will be able to recognize effective leadership practices, describe best practices in communication and engagement of teams, and identify methods to successfully navigate conflict.</p>
<b>Format</b>	<ul style="list-style-type: none"> <li>• Delivery Method: Classroom instructor-led</li> <li>• Duration: 3 Days (4-hour sessions)</li> <li>• Course Format: Participants will work in small groups</li> </ul>
<b>Courses</b>	<p>Course 1: Communication</p> <p>Course 2: Leading vs. Managing</p> <p>Course 3: Conflict Resolution</p>
<b>Recommended Content</b>	<ul style="list-style-type: none"> <li>• PowerPoint presentations</li> <li>• Self assessments</li> <li>• Small group exercises</li> <li>• Case studies</li> </ul>

# Course 1: Communications

<p><b>Description</b></p>	<p>The purpose of this course is to enhance participants' awareness of the communication context, and their ability to productively message information and intent to crucial internal and external stakeholders. This training will focus on effective ways to communicate, how to achieve increased clarity, and understanding differences in communication styles. It will also train participants to better describe how they personally communicate and identify the communication styles of others.</p>
<p><b>Learning Objectives</b></p>	<ul style="list-style-type: none"> <li>• Comprehend the three-pronged “sender-message-receiver” (SMR) model of communication</li> <li>• Effectively utilize the SMR model</li> <li>• Awareness of individual communication preferences and styles</li> </ul>
<p><b>Topics</b></p>	<ul style="list-style-type: none"> <li>• SMR model</li> <li>• Communication preparation, process, and product</li> <li>• Formulating key subject elements</li> <li>• Inquiry before action</li> <li>• Individual communication style</li> </ul>
<p><b>Materials</b></p>	<ul style="list-style-type: none"> <li>• PowerPoint presentation</li> <li>• Mini-case study</li> <li>• Exercises</li> <li>• Communication style assessment</li> </ul>

<b>Description</b>	The purpose of this course is to expose participants to the functional differences and complementary nature of leadership and management. Proper and precise functioning in any organization requires constant balancing of these two forces.
<b>Learning Objectives</b>	<ul style="list-style-type: none"> <li>• Identify the distinction between leadership and management in practice</li> <li>• Appreciate the value of followership</li> <li>• Prepared to implement policy and influence culture to capitalize on the value of leading and managing</li> </ul>
<b>Topics</b>	<ul style="list-style-type: none"> <li>• Why organizations are over-managed and under-led</li> <li>• The impact of policy and culture on a healthy, productive workplace</li> <li>• Ten leadership propositions</li> <li>• Leadership as an emotional relationship</li> </ul>
<b>Materials</b>	<ul style="list-style-type: none"> <li>• PowerPoint presentation</li> <li>• Self-reflection journal</li> </ul>

<b>Description</b>	<p>The purpose of this course is to work through real-life scenarios where conflict-resolution techniques and processes can be used to resolve internal workplace dynamics. This course will be led by a change leader from the OCM team who has expertise in leadership and will teach participants how to navigate, guide, and coach individuals and teams through conflict. Sessions will be based on topics currently being encountered within the organization. This hands-on training will provide an interactive experience, allowing attendees to collaborate with their colleagues to create strategies to resolve conflicts.</p>
<b>Learning Objectives</b>	<ul style="list-style-type: none"><li>• Understand the nature of conflict and interdependencies</li><li>• Able to analyze the dynamics of a specific conflict</li><li>• Develop skills to create collaborative environments</li></ul>
<b>Potential Topics</b>	<ul style="list-style-type: none"><li>• Interdependence and game theory</li><li>• Competition, cooperation, collaboration, avoidance, and compromise</li><li>• Dilemmas of trust, honest, and perception</li><li>• Claiming and creating value</li><li>• Principles of collaboration</li></ul>
<b>Materials</b>	<ul style="list-style-type: none"><li>• Whiteboard and flip charts</li><li>• Relevant takeaway materials</li></ul>

# Change Labs

<b>Description</b>	Change Labs are an opportunity for management-level personnel to work through relevant change management-related issues in a group setting with OCM team members. OCM team members guide participants in assessing issues and developing effective strategies to achieve desired outcomes. Participants will be able to immediately implement new concepts and begin executing strategies to address change management challenges head on.
<b>Learning Objectives</b>	<ul style="list-style-type: none"> <li>• Acquire new strategies to address change management issues</li> <li>• Understand how to apply new concepts to counter change management challenges</li> </ul>
<b>Format</b>	<ul style="list-style-type: none"> <li>• Delivery Method: Classroom instructor-led</li> <li>• Duration: 60 minutes</li> <li>• Course Format: Participants will work in small groups</li> </ul>
<b>Potential Topics</b>	<ul style="list-style-type: none"> <li>• Managing personal resistance</li> <li>• Communicating change effectively with staff</li> <li>• Being an advocate of change</li> </ul>
<b>Materials</b>	<ul style="list-style-type: none"> <li>• Whiteboards and flip charts</li> <li>• Relevant takeaway materials</li> </ul>



**Organizational Change Management (OCM) Training – Questionnaire**



Date of Attendance: \_\_\_\_\_

RPTA Unit: \_\_\_\_\_

Thank you for your recent participation in a workshop on OCM! The purpose was to provide you with the fundamentals to manage and bring about positive change within a business environment and to ease the transition between a constant implementation cycle and the stabilization of the organization with the newly implemented technology. Please fill in the appropriate bubble next to each statement below and provide feedback in our strengths and suggestions boxes.

Evaluation Topics	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1) Overall, I was satisfied with the OCM training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2) Overall, I would recommend this training to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3) The overall program objectives as described by the instructor were met.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4) Training content was appropriate to learn and was relatable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5) This course will have an immediate impact on my current job performance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6) Adequate time was provided for the amount of information covered.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7) The course was appropriate for my level of understanding.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8) The materials used during the program were relevant, useful, and accurate (i.e., participant materials, job aids, and audio/visual.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



**Organizational Change Management (OCM) Training – Questionnaire**



Evaluation Topics	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
9) The training facility and/or technological equipment was satisfactory and appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10) The instructor's knowledge and presentation skills were effective.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11) I will be able to use the tools and techniques provided to identify and manage my response to change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Evaluation Topics	100%-80%	79%-60%	59%-40%	39%-20%	19%-10%	10% or less
12) What percentage of your job will be impacted or improved by the information provided through participating in this workshop(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Describe what you liked about the training:

Provide suggestions for future trainings:

## Next Steps

### The OCM team will:

Work with OTR leadership to develop a suitable training schedule.

Schedule a meeting to introduce appropriate leadership to Dr. James Bailey, RBG's training specialist.

Collaborate with appropriate parties to gather information to develop case studies relevant to OTR's needs.