

## ATTACHMENT C

### STATEMENT OF QUALIFICATIONS (SOQ)

(Revised Pursuant to Addendum No. 1, August 12, 2016)

Section 1: ADR Provider Contact Information & Languages			
Last Name	Oller	First Name	Marshal
Company Name	Plank Road Solutions, LLC		
Business Address	8 N. State Street, Suite 301		
City	Lake Oswego	State	OR
Zip Code	97034	Phone 1	503-956-5373
E-mail	marshal@plankroadsolutions.com		
Web Site	www.plankroadsolutions.com		
Languages Spoken	English	Fax #	(503) 636-8512

#### Section 2: Provider Overview

The following Section provides a brief overview of the provider's experience and qualifications

**Marshal Oller has over 20 years of leadership, mediation and negotiation experience working for the Federal Government, educational / non-profit institutions, and local industries. Marshal has demonstrated expertise in contract negotiation, workplace mediation, strategic planning, process improvement, program / project management, transportation policy planning, state / local municipality environmental and land use compliance.**

**Marshal's refined his Alternate Dispute Resolution (ADR) methodology internationally working for the Department of Defense in Iraq, Kuwait, Qatar, Panama and Korea. He has resolved everything from individual office conduct violations to large multi-party group public policy facilitations for land use.**

**In addition to his wealth of experience in mediation and negotiation, Marshal is a Project Management Institute (PMI) certified Project Management Professional (PMP) with expertise leading and managing construction, IT, healthcare and organizational change management projects ranging from \$500K to \$25M.**

**Mr. Oller is certified as a Lean Six Sigma Black Belt by the University of California San Diego with demonstrated ability to improve processes, increase organizational efficiency and realize significant operational cost savings.**

**A lifelong learner, Marshal possesses a Masters of Science in Logistics Management and Transportation from Florida Institute of Technology (FIT) and will be graduating in August 2017 from Willamette University with a Masters of Business Administration (MBA) concentrating in Negotiations, Operations and Strategy.**

<b>Section 3 Services Offered and Rate</b>			
Type of Service Key Person Desires to Offer & is Qualified to Offer	ADR Provider Billing Rate per hour	Support Staff Billing Rate Per Hour (Rate/Title)	The following items, if checked, are expenses that may be passed through at cost to the agency (See Price Agreement for details):
<input checked="" type="checkbox"/> 1. A <u>Mediation General Practitioner</u> is an impartial third party who assists two or more parties in reaching a mutually acceptable resolution to a controversy. These Practitioners have broad mediation experience and skills and are able to adapt mediation to a wide variety of circumstances, including workplace disputes.	240.00	55.00 to 95.00 (range) Administrative Assistant	<input checked="" type="checkbox"/> Copy/print charges <input checked="" type="checkbox"/> Facility Use/ Rental Fees
<input checked="" type="checkbox"/> 2. A <u>Facilitation General Practitioner</u> is an expert at helping large groups work effectively towards a desired objective. These Practitioners have sufficiently broad experience and skills so as to be able to design and facilitate a large group process to achieve variety of goals or objectives.	250.00	75.00 to 105.00 (range) Administrative Assistant	<input checked="" type="checkbox"/> Copy/print charges <input checked="" type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 3. A <u>Public Policy Facilitator</u> is an expert at helping governmental entities and diverse stakeholders reach agreement on controversial public policies or public projects, often within a complex legal, political or regulatory context. These providers are experienced at assessing, designing, convening and facilitating collaborative processes.			<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 4. A <u>Public Involvement Practitioner</u> is an expert at helping governmental entities engage the public on public issues or projects. These providers are able to design and implement an appropriate public involvement process from projects that seek to inform or educate the public to projects that allow for greater public involvement via consultation or collaboration.			<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility rental fees <input type="checkbox"/> Mail or bulk email fees <input type="checkbox"/> Telephone charges <input type="checkbox"/> Website hosting, online software or online services fees <input type="checkbox"/> Video production services <input type="checkbox"/> Other Subcontractors

<b>Section 4A: Does the Provider charge travel expenses to provide services in your area?</b>		
<b>County or County Area</b>	<b>Available to work in this area without charging travel expenses.</b>	<b>Available to work in this area but will charge travel expenses</b>
1 Clatsop, Columbia, Tillamook – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Washington, Multnomah – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Polk, Marion, Yamhill – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 Lincoln, Benton, Linn – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Lane – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Douglas – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Coos, Curry – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Josephine, Jackson – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Hood River, Wasco, Sherman, Gilliam, Wheeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Jefferson, Crook, Deschutes – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 Lake, Klamath – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 Morrow, Umatilla - Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Wallowa, Union, Grant, Baker – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 Harney, Malheur – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Clackamas – County	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<p><b>Section 4B: Hourly Travel Charges.</b> <i>If, in addition to allowable travel expenses, the Provider will charge for travel time and the travel time of administrative assistants or staff, or both, the hourly travel rate for Proposer and each of Proposer's administrative assistant and staff must be identified here: :</i></p>		
<p><b>50% of rates listed in Section 3.</b></p>		

**Section 5: Standards the Provider Subscribes to and Licenses Held**

- Oregon Mediation Association Core Standards of Mediation Practice, April 23, 2005  
(<http://www.mediate.com/oma/pg61.cfm>)
- Association for Conflict Resolution, Model Standards of Conduct for Mediators, 2005 revisions.  
[http://www.imis100us2.com/acr/ACR/Resources/Model Standards/ACR/Resources/Model Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08](http://www.imis100us2.com/acr/ACR/Resources/Model%20Standards/ACR/Resources/Model%20Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08)
- Model Standards of Practice for Family and Divorce Mediation  
[http://www.imis100us2.com/acr/ACR/Resources/Model Standards/ACR/Resources/Model Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08](http://www.imis100us2.com/acr/ACR/Resources/Model%20Standards/ACR/Resources/Model%20Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08)
- International Association for Public Participation (IAP2), Code of Ethics for Public Participation Practitioners (See  
<http://www.iap2.org/displaycommon.cfm?an=1&subarticlenbr=8>)
- Other professional standards that the provider subscribes to:
- Oregon State Bar #
- Other professional licenses: **Marshal Oller - Project Management Institute PMP #1657113**

<b>Section #6: Provider's Specialized Areas of Expertise</b>		
<i>Area of Expertise</i>	<i>Sub Specialty</i>	<i>Areas of expertise</i>
Business and Finance	General	<input checked="" type="checkbox"/>
	Investment and Finance	<input type="checkbox"/>
	Patents or Intellectual Property Rights	<input type="checkbox"/>
Civil Rights	Civil Rights	<input type="checkbox"/>
Consumer	All Types, Consumer-Merchant Disputes	<input checked="" type="checkbox"/>
	Assistive Technologies	<input checked="" type="checkbox"/>
	Vehicle Sales, Service or Repair	<input checked="" type="checkbox"/>
Cultural	Cross Cultural, Ethnicity, or Related Fields	<input checked="" type="checkbox"/>
Education	Education	<input checked="" type="checkbox"/>
	Special Education	<input type="checkbox"/>
Environmenta	Agricultural Exceptions (goal 2)	<input type="checkbox"/>
	Agriculture	<input type="checkbox"/>
	Air, Land and Water Quality	<input checked="" type="checkbox"/>
	Coastal	<input checked="" type="checkbox"/>
	Endangered Species or Wildlife	<input checked="" type="checkbox"/>
	Energy	<input checked="" type="checkbox"/>
	Forestry	<input checked="" type="checkbox"/>
	Hazardous Materials and Environmental	<input checked="" type="checkbox"/>
	Other Natural Resource Related	<input checked="" type="checkbox"/>
	Water Resources, Wetlands	<input checked="" type="checkbox"/>
	Governmental and Regulatory	Government-to-Government (e.g., state-tribal)
Professional Licensing		<input checked="" type="checkbox"/>
Public Utilities		<input checked="" type="checkbox"/>
Human Services	Child Dependency and Permanency Planning (Adoption)	<input type="checkbox"/>
	Disability	<input type="checkbox"/>
	Family Services, including Service Plans	<input type="checkbox"/>
	Health Care	<input checked="" type="checkbox"/>
	Senior Services	<input type="checkbox"/>
	Social Services	<input type="checkbox"/>
	Vocational Rehabilitation	<input checked="" type="checkbox"/>
	Public Assistance - AFS	<input checked="" type="checkbox"/>
International	International	<input checked="" type="checkbox"/>
Labor and Employment	Collective Bargaining and Labor	<input checked="" type="checkbox"/>
	General Employment and Human Resources	<input checked="" type="checkbox"/>
	Workers' Compensation	<input type="checkbox"/>
	Workplace Interpersonal Disputes	<input checked="" type="checkbox"/>
Torts or Insurance Claims	Torts or Insurance Claims	<input type="checkbox"/>
Transportation, Housing and Land Use	Construction Industry & Contracts, Civil Engineering	<input checked="" type="checkbox"/>
	Eminent Domain	<input checked="" type="checkbox"/>
	General Planning	<input checked="" type="checkbox"/>
	Growth Management	<input checked="" type="checkbox"/>
	Housing	<input type="checkbox"/>
	Land Use	<input checked="" type="checkbox"/>
	Railroad	<input checked="" type="checkbox"/>
	Real Property	<input checked="" type="checkbox"/>
	Siting Controversial Projects or Facilities	<input checked="" type="checkbox"/>

### Section 7: Relevant Education and Training

Master of Business Administration (MBA-P '17) Willamette University  
Master of Logistics & Transportation Management Florida Institute of  
Technology  
Bachelor of Science in Aerospace Studies Embry-Riddle  
Aeronautical University  
Lean Six Sigma Black Belt Certificate, University of California San Diego  
Project Management Professional Certificate Project Management Institute  
Strategic Planning Certificate Command & General Staff College  
Trainer / Mentor / Instructor Certification Joint Readiness Training Center  
Basic Environmental Law, US Navy  
Instructor / Group Facilitator Training, US Army.

### Section 8: Relevant Training Conducted by the Provider

Applying Lean Six Sigma techniques to improve your budget forecasts, 1 Hour course  
Project management strategies for environmental assessment and remediation projects, 1 Day course  
Stakeholder management and communication facilitator training, 5 Day course  
Creating effective change management initiatives, 1 Day course  
Developing a culture of innovation in a bureaucratic environment, 1 Hour course  
Strategic planning process for managers, 5 day course

### Section 9: Workplace Mediation Experience

#### Work Place conflict resolution examples

**Cultural dynamics:** Brought in to mitigate a toxic situation in a workgroup (co-workers were not effectively communicating causing reduced production and employee distress). The situation was rapidly deteriorating based on ignorance of cultural norms, erroneous perceptions, and ambiguous job descriptions. Conducted a sensing session to air grievances followed by sensitivity and cultural awareness training. Working collaboratively with all parties created a division of labor and formalized the workflow process. Established team benchmarks, identified stretch goals and deployed an incentive program.

**End State:** Employee satisfaction consistently rated as 5/5 stars. Productivity went up 75%, and stretch goals were achieved in 180 days.

**Organizational realignment:** During an massive corporate realignment was tasked to oversee the establishment of a new support structure for an 5,000 person organization. Mr. Oller identified employee concerns, articulated management expectations, created meaningful two-way dialogue through the creation of working groups to resolve workplace friction and create a shared vision and delivered an agreed upon roadmap for success.

**End State:** Change management plan was used as a template for future organizational changes. The new organization successfully competed at the

**national level winning top honors in maintenance operations, supply excellence and warehousing management categories.**

**Section 10: Litigation Settlement Related Experience**

N/A

**Section 11: Overall Mediation Experience**

**Marshal Oller has conducted over 200 hours of workplace mediations in 20 years of government service. Marshal's facilitated approach accommodates for language and cultural barriers with dispute resolution experience in seven countries and all regions of the United States. Mr. Oller's mediation expertise covers resolving employee conflict, managing workplace disputes, mentoring junior managers, mitigation organizational change and building cohesive teams through open communication and collaboration.**

**Section 12: Facilitation Experience**

**Marshal Oller led the dispute resolution for a stalled multi-million-dollar project to conduct a thorough environmental cleanup of HAZMAT contaminated land on San Clemente Island, California. Working through the impasse by engaging all 16 stakeholders to include state and county officials, US Navy entities, contracting officials and the engineering company that would serve as the prime contractor. The issue of finger pointing and causation was resolved when Mr Oller arranged for the land owner to underwrite the uncertainty and agree to a period of amnesty for all the environmental misgivings that occurred over the past 40 years in exchange for providing funding for the restoration project. The environmentalists and engineers were adamant that the plan needed to include a lifecycle maintenance clause and a periodic use / cleaning schedule in order to maintain a level of habitat regrowth. Marshal was able to structure the contract to address both requirements providing a sequence of periodic maintenance and implementing a training land rotation policy. Finally, transportation and disposal rates had to be negotiated based on anticipated yield and the potential for uncovering hazardous material. Marshal identified an equitable compensation structure that provided funding for the removal and disposal of extra material unearthed from the work site. End State: Over 80,000 lbs. of non-organic material was removed from the training area's soil, safely barged off the island and disposed of via proper Hazardous material disposal protocols. The affected areas were restored to functional status without any disruption to training.**

**Section 13: Public Policy Facilitation Experience**

N/A

**Section 14: Experience as a Public Involvement Practitioner**

N/A