

ATTACHMENT C

STATEMENT OF QUALIFICATIONS (SOQ)

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

Section 1: ADR Provider Contact Information & Languages			
Last Name	Kincade	First Name	Wendy
Company Name	BlueSkyMorning		
Business Address	5060 SW Philomath Blvd #333		
City	Corvallis	State	OR
Zip Code	97333	Phone 1	541-829-3887
E-mail	wendy@blueskymorning.com		
Web Site	www.blueskymorning.com/wp		
Languages Spoken	English	Fax #	888-648-1725

Section 2: Provider Overview
The following Section provides a brief overview of the provider’s experience and qualifications

Mission: To make a positive difference in the world by helping others develop happier, healthier, more productive people and environments.

As a mediator, Wendy facilitates conversations between lenders and homeowners for the Oregon Foreclosure Avoidance Program, a program overseen by the Oregon Department of Justice that is designed to help parties discover and agree on alternatives to foreclosure. Beginning in late 2013, Wendy has now facilitated 102 conversations, with positive outcomes occurring in 70 cases, 57 of which resulted in agreements between the parties that made it possible for the homeowners to afford their mortgages and stay in their homes.

As a conflict expert, in the workplace Wendy conducts global assessments and provides comprehensive analyses, including recommendations for appropriate combinations of responses—i. e. mediation, facilitation, education, training, coaching, counseling, treatment, legal proceedings, suspension, termination, etc.—and provides clients with suggested resources for services that are outside the scope of her expertise as a mediator, facilitator, and conflict coach.

As a skilled organizer of people and paperwork, Wendy has 15+ years of business leadership experience in finance, accounting, administration, information technology, and human resources in the commercial construction industry (bridges, roads, water treatment plants).

On a personal note, Wendy is based in Philomath, Oregon. She has two adult sons and five amazing grandchildren. She is an active volunteer with Rotary International, the Whiteside Theatre (Corvallis), and Neighbor to Neighbor Mediation (Linn and Benton Counties).

Section 3 Services Offered and Rate			
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.	125.00	25.00 to 40.00 (range) Administrative Assistant	<input checked="" type="checkbox"/> Copy/print charges <input checked="" type="checkbox"/> Facility Use/ Rental Fees
<input 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.	00.00	00.00 to 00.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input 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.	00.00	00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title	<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.	00.00	00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title	<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

Section 4A: Does the Provider charge travel expenses to provide services in your area?

County or County Area	Available to work in this area without charging travel expenses.	Available to work in this area but will charge travel expenses
1 Clatsop, Columbia, Tillamook – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Washington, Multnomah – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3 Polk, Marion, Yamhill – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 Lincoln, Benton, Linn – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5 Lane – County	<input checked="" type="checkbox"/>	<input 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 type="checkbox"/>	<input checked="" type="checkbox"/>

Section 4B: Hourly Travel Charges. *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: :*

Rate for travel time for principal mediator: \$40/hour

Rate for travel time for administrative assistant: \$25/hour

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
- 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
- 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:

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

Section 7: Relevant Education and Training

MASTER OF SCIENCE, CONFLICT AND DISPUTE RESOLUTION – 2012-2014

University of Oregon School of Law – Eugene, Oregon

RELEVANT TRAINING, COURSE WORK, CONTINUING EDUCATION – 2011-2016

(250 training hours + 35 semester credits + 150 hours continuing education)

Oregon Foreclosure Avoidance (OFA) Mediation Training and Certification, Oregon Department of Justice – Training to mediate/facilitate foreclosure avoidance cases in Oregon – Portland, OR (2012)

Restorative Justice / Victim-Offender Mediation Training and Certification, Neighbor to Neighbor (N2N) – Training to mediate victim/offender cases in Oregon – Salem, OR (2012)

Good Relations Facilitation Trainer Training, Peace and Reconciliation Group – Trainer training for facilitating Good Relations training in Northern Ireland – Derry/Londonderry, Northern Ireland, UK (2013)

Coaching Abrasive Leaders (Boss Whispering) Training and Certification, Boss Whispering Institute (BWI) – Training for coaching abrasive leaders and beginning the BWI coaching accreditation process; training builds upon the concepts and practices of conflict coaching, a method often used as a supplement to two-party mediations and group facilitations – Portland, OR (2013)

Facilitating Collaborative Governance to Solve Public Issues Training and Certification, National Policy Consensus Center (NPCC) – Facilitator training for NPCC interns – Eugene, OR (2013)

Advanced Negotiation – University of Oregon – Concepts and practices for managing difficult negotiation tactics and high-level emotions during negotiation – Eugene, OR (2013)

Cross Cultural Dynamics in Conflict Resolution, University of Oregon – Cultural competency models; study, utilize, and practice methods of interpersonal and intercultural communication – Eugene, OR (2013)

Dialogue Across Differences, University of Oregon – Dialogic theory; practice dialogue as a tool for facilitating large group conflicts with differing cultural perspectives – Eugene, OR (2013)

Continuing Education – Oregon Mediation Association’s Annual Conference (2012, 2013, 2014); NW Justice Forum (2013, 2015); seven (7) weeks of cultural conflict training in Derry, Northern Ireland (2013); Oregon Mediation Association’s Implicit Bias Training (2016); monthly ADRHub webinars from the Werner Institute at Creighton University (2014-2016)

Section 8: Relevant Training Conducted by the Provider

COACH/MENTOR/TRAINER, MEDIATION – 54 hours

Neighbor to Neighbor Mediation (2012 – Present) – Albany, OR

Provide coaching and mentoring to new mediators during basic mediation training; provide ongoing coaching and mentoring to new and experienced mediators before, during, and after co-mediation sessions; provide ongoing coaching and guidance to fellow mediators

FACILITATOR/TRAINER, RESTORATIVE JUSTICE & DIALOGUE – 132 hours

Insight Development Group (Oct 2014 – Jun 2015) – Salem, OR

As a member of an eight-person facilitation/training team, co-facilitated a 33-week restorative justice and dialogue training program for fifteen (15) male inmates at the Oregon State Correctional Institute in Salem, Oregon. On-site activities included working with other facilitators to design curriculum (1 hour per week) and deliver dialogic-style trainings (3 hours per week) to inmates. Off-site activities included research, design, and creation of informational handouts to enhance the learning of participants and facilitators

FACILITATOR/TRAINER, DIALOGUE – 32 hours

University of Oregon (Oct 2013 – Jan 2014) – Eugene, OR (Philomath, OR)

As part of a master's thesis research project, delivered an eight-week dialogic-style classroom training to four (4) groups of twenty-five (25) sixth-grade students at Philomath Middle School. The training was designed to teach dialogic principles and practices to youth, and included a variety of age-appropriate small, medium, and large group activities using experiential learning techniques. Quantitative and qualitative data was collected during and after each session, and eventually became part of a final research paper. A full published version of this paper can be found at:

(https://scholarsbank.uoregon.edu/xmlui/bitstream/handle/1794/18343/Kincade_oregon_0171N_10948.pdf?sequence=1).

FACILITATOR/TRAINER, DATA COLLECTION – 40 hours +

U.S. Census Bureau, 2010 Census (Feb 2010 – Jun 2010) – Corvallis, OR

Conducted a five-day (40-hour) classroom training for a field crew of twenty-five (25) NRFU (non-response follow-up) enumerators during the 2010 U.S. Census data collection process using a combination of verbatim curriculum, facilitated group discussion, and live field work; supervised crew members' data collection activities over a three-month period, and provided ongoing productivity data and analyses to the Corvallis Field Operations Supervisor and to the U.S. Census Bureau's Salem regional office

Section 9: Workplace Mediation Experience

**CONFLICT COACH/MEDIATOR/FACILITATOR/ANALYST – 20 years
BlueSkyMorning (1996 – Present) – Oregon and California**

Historically, employers have been reluctant to bring the practice of mediation into the workplace. This reluctance has led to the development of a method, commonly referred to as conflict coaching, where the coach/mediator works with one of the individuals in a conflict to help them: 1) understand how they might be contributing to the conflict; 2) understand what might be going on for the other person or persons in the conflict; and 3) brainstorm ways they might contribute to resolving the conflict .

Wendy has worked with numerous employers as a conflict coach. Most cases resolved fairly quickly (in one or two sessions). Some cases, however, required a global analysis before an appropriate combination of responses—i. e. coaching, mediation, education, training, termination, etc.—could be recommended. (200+ coaching / 50+ hours analysis)

One type of intense conflict coaching is Boss Whispering, a method used primarily for working with highly abrasive managers in the workplace to help them recognize the damage they are doing to themselves and to others through their abrasive behavior, and then help them identify ways to get their needs met using new, non-damaging behaviors. (In training)

Wendy has also led large group (30+) workplace conversations that encourage people's concerns over process and productivity to surface and be addressed respectfully and effectively. While Wendy's role in these conversations may appear to be that of a facilitator, she sees her role as more of a trainer and a mediator. As a trainer, she brings in pre-determined topics and information that relate to the organization's concerns. As a mediator, she helps everyone in the room recognize and value the needs of others, then work collaborately to find solutions that meet these needs. (45 hours)

Section 10: Litigation Settlement Related Experience

Section 11: Overall Mediation Experience

MEDIATOR/FACILITATOR – OREGON FORECLOSURE AVOIDANCE (OFA)

Center for Dialogue and Resolution (Nov 2013 – Present) – Eugene, OR

*** OFA: 102 cases completed; 205 hours logged (in 190 sessions)**

Description: Serve as principal mediator/facilitator in resolution conferences between lenders and homeowners as part of the Oregon Foreclosure Avoidance Program (as legislated by the State of Oregon, overseen by the Oregon Department of Justice, and managed by Mediation Case Manager). Primary functions are to: 1) facilitate group conferences between lenders, lenders' attorneys, homeowners, homeowners' attorneys, and housing counselors; 2) assist parties in exchanging information that might help them find a mutually agreeable alternative to foreclosure; 3) ensure that the conference portion of the OFA statute is followed; and 4) complete documentation to memorialize conference outcomes.

MEDIATOR – SMALL CLAIMS, MFG HOME PARKS, JUVENILE VICTIM/OFFENDER

Neighbor to Neighbor Mediation (Jan 2011 – Present) – Linn/Benton Counties (Total of 70 cases completed; 650 hours logged (includes conferences, pre-mediation interviews, case development, scheduling, research, organizing, paperwork, etc.)

*** Small Claims: 43 cases completed; 129 conference hours logged**

*** Oregon Mfg Home Parks: 3 cases completed; 18 conference hours logged**

*** Juvenile Victim/Offender: 17 cases completed; 73 conference hours logged**

Highlight Case #1 (90 hours): Two (2) high school-aged offenders; nineteen (19) middle school victims (and their parents); one (1) principal mediator (the proposer); two (2) co-mediators; four (4) months of preparation, organizing, scheduling, pre-mediation interviews, etc. The mediation conference lasted less than three (3) hours, but the case from start to finish required 90 hours of principle mediator time (plus many hours of co-mediator time) to ensure the conference would go well. Case outcome was highly positive and included a restorative agreement satisfactory to all parties.

Highlight Case #2 (160 hours): One (1) high school-aged offender; seven (7) primary victim families/groups; fifteen (15) secondary victims; twenty (20) affected agencies; an undetermined number of affected community members; and extended local media exposure. The mediation team consisted of one (1) principal mediator (the proposer), one (1) co-mediator, and one (1) facilitator; duration of the case from start to finish was nine (9) months. The mediation conference lasted only 2.5 hours, but the amount of time needed by the principal mediator (to coordinate the mediation team; establish and communicate a strategy; contact all potential parties; schedule and conduct interviews; assess and prepare participants; write letters and press releases; work with mediation team to design a restorative circle process; keep everything and everyone organized) was 160 hours. Case outcome was exceptionally positive for all.

Section 12: Facilitation Experience

GROUP FACILITATOR - NON-PROFIT LEADERSHIP - 120 meetings, 300 hours

As a long-time member of various non-profit boards and working committees, Wendy has been the principal facilitator for more than a hundred group meetings, in a variety of sizes: small groups (3-6 people), medium groups (7-25), and large groups (26-35); conservatively estimated at two meetings per month for five years (60 months), Wendy has facilitated a minimum of 120 meetings; and at an average of 2.5 hours per meeting, Wendy has logged a minimum of 300 facilitation hours. The majority of these 300 hours were spent facilitating medium-sized groups—65% or 195 hours; small groups were next at 20% or 60 hours; leaving 15% or 45 hours for large groups.

Section 13: Public Policy Facilitation Experience

Section 14: Experience as a Public Involvement Practitioner

CO-FACILITATOR, FOCUS GROUP - 9 hours (3 sessions) Oregon Governor's Reentry Council (Aug 2014–Nov 2014)

Wendy served as a member of a five-person co-facilitation team conducting research with inmates and new releases at Coffee Creek Correctional Facility, Oregon State Correctional Institute, and Lane County re-entry support services; survey focused on asking inmates and new releases what types of programs and services they believed would help them succeed on the outside and not recidivate.