



Breckenridge Institute
HARNESSING THE POWER OF CULTURE™

Corporate Capability Statement

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Management, Scientific, and Technical Consulting Services

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Company Summary

The Breckenridge Institute® is a research and consulting firm that focuses on organization development and organizational culture with offices in Boulder, Colorado. Since 1995, our staff of technical and business professionals has been providing the highest levels of service, competence, quality, and value to our clients using a portfolio of research-based methodologies and assessment tools. Currently with 12 people on staff, the Breckenridge Institute® has experience in the areas of high-tech, R&D, basic research, pharmaceuticals, health care, retail, commercial construction, and resort management, as well as government-funded research in the National Labs, and non-profit organizations.

Areas of Expertise

The Institute's *Center for Business-to-Business Consulting* has extensive expertise in the seven areas listed below.

What We Do

- Developing Strategy
- Improving Execution and Operations
- Organizational Climate and Culture
- Building IT Infrastructure
- Business Systems Integration
- Meeting and Process Facilitation
- Training and Mentoring
- Organizational Assessments

Results Clients Get

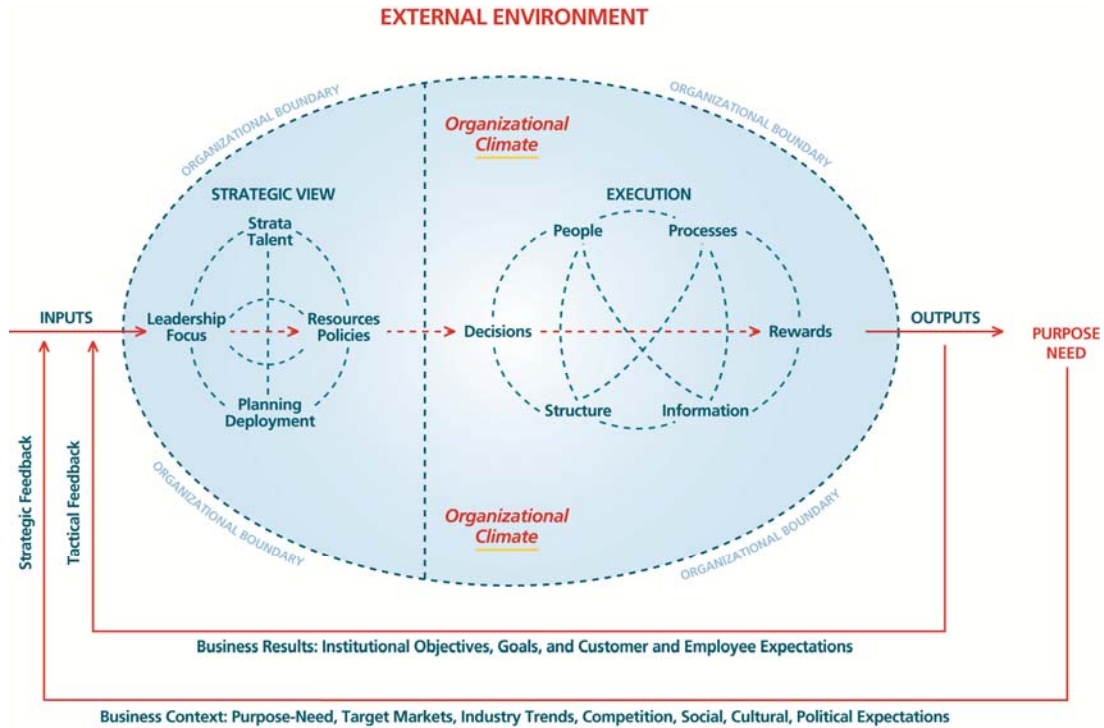
Aligning and integrating an organization's structures, systems, and culture in the areas listed above helps client organizations to:

- Increase Total Revenue
- Decrease Operating Costs
- Increase Productivity and Efficiency
- Decrease Destructive Conflict
- Increase Effective Communication
- Discover Hidden Profit
- Build a Culture of Excellence

A more detailed description of the Institute's areas of expertise is provided below.

Organizational Model

Our areas of expertise are built around the open-systems diagram shown below. Aligning and integrating an organization's strategy, execution, and climate is key to building a high-performing organization and ensuring sustainable performance. The structures, systems, and climate shown in the diagram have an *interdependent* cause-and-effect relationship with each other, so a change in one element creates change in the others, sometimes unintentionally.



Seamlessly integrating these business systems with IT infrastructure is also a key to building a high-performing organization. The Breckenridge Institute® staff helps clients develop an IT infrastructure that: a) moves information from the external environment to the correct place in the organization so it can be analyzed, digested, and acted on, b) moves information from enterprise-wide business processes to the correct place in the organization so it can be analyzed, digested and acted on, c) moves information on the status of key performance indicators (KPIs), goals, milestones, deliverables, and budgets in operating plans to the correct place in the organization so it can be analyzed, digested and acted on, and d) structures and manages data storage so it is a resource that's available to everyone who needs it, e.g. data isn't isolated in data silos or shadow systems.

Our goal is to design systems that help clients find key business-related information within 30 seconds using a minimum number of clicks.

Developing Strategy

The Breckenridge Institute® helps organizations take a strategic (100,000 foot elevation) view of the external environment and internal operations using methodologies based on principles taught by business experts such as Jim Collins, Peter Drucker, Jay Galbraith, Harry Beckwith, Al Ries and Jack Trout, Larry Bossidy, Michael Porter, Edwards Deming, research results from the *Harvard Business Review*, and the Global Organization Design model developed by Elliot Jaques. We help clients:

- Define organizational purpose, direction, strategy, goals, objectives, and codify them in a written strategic plan that is linked to their financial management system
- Identify the most important sources of revenue that drive financial performance
- Develop a balanced array of key performance indicators (KPIs) to focus the time and energy of the entire organization on a common purpose
- Only budget for, and commit resources to, things that help the organization achieve its strategic goals and objectives

- Evaluate their talent management strategy to ensure that they have the expertise, experience, and intellectual horsepower to meet the organization's human capital needs now and in the future
- Ensure that the organization's high-level policies are aligned with its strategy, goals and objectives and send a consistent set of signals that reinforce the desired behaviors
- Motivate and inspire employees around the organization's purpose and vision
- Create and sustain organizational change to get the desired results

Improving Execution and Operations

The Breckenridge Institute® helps clients more effectively carry-out and implement the organization's plans, goals, and objectives so that strategic goals and objectives flow down to (and are implemented by) work groups. Our staff uses methodologies and principles taught by business experts such as Dave Hanna, Alec Sharp, Edwards Deming, Thomas Davenport, Paul Harmon, J.M. Juran, Alfie Kohn, Edwards Deming, the *Human Performance Technology* model, research results from the *Harvard Business Review*, and the Global Organization Design model developed by Elliot Jaques. We help clients:

- Translate strategic goals and objectives into well-defined operating plans and budgets that flow down to day-to-day, week-to-week work assignments of managers and staff members
- Develop action-oriented, fact-based decision-making skills using quantitative data and scientific analytics, not just business experience and intuition
- More effectively direct week-to-week and month-to-month operations by only supporting decisions that implement and accelerate achieving goals and objectives
- View *time as money* that can be used to achieve the organization's goals and objectives
- Organize and staff work-groups so the right people work together on the right tasks to get the desired results
- Produce predictability and order in business processes and day-to-day operations
- Increase communication and cooperation between departments and work-groups so that key information is shared, e.g. the left hand knows what the right hand is doing
- Develop more innovation and creative problem solving skills
- Optimize team performance and morale

Organizational Climate and Culture

The Breckenridge Institute® helps clients create a more productive, positive, effective and creative work environment, e.g. Organizational Climate. More specifically, "climate" is the experience of what it's like to work in an organization day-to-day and is a reflection of the underlying tacit assumptions and cultural norms that compose an organization's culture. The Institute's staff uses methodologies and principles taught by business experts such as Edgar Schein, John Kotter, David Cooperrider, Terrence Deal and Allan Kennedy, Chris Argyris, Clotilde Rapaille, Alan Wilkins, Howell Baum, William Bridges, Lawrence Millar, Rollo May, Anthony Storr, Arthur Koester, research results from the *Harvard Business Review*, and the Global Organization Design model developed by Elliot Jaques. We help clients:

- Adopt a “no blame” philosophy where the root causes of ineffective organizational performance are identified in the structures, systems, and culture, e.g. individual employees don’t get blamed for organizational performance problems
- Practice “fair process” where managers are fair and objective and base their evaluations of performance on facts and quantitative data, not “politics” or personalities
- Identify and narrow the gap between the formal (written) rules for how things get done and the informal (unwritten) rules for how things “really” get done
- Create an atmosphere in which people trust managers to deliver on their promises and do what they say
- Develop well-defined *accountabilities* where managers are held accountable for the outputs of their direct reports, for creating and sustaining a team capable of producing the desired outputs, and for getting their direct reports to collaborate with each other to produce the desired results
- Develop well-defined *authorities* where managers can veto the appointment of people to their organization, conduct performance appraisals of their direct reports and reward the desired behaviors and discourage ineffective performance, and initiate the removal of a direct report from their role in the organization

Building IT Infrastructure

Enterprise-wide knowledge management requires that leaders and managers put their organization’s “whole brain” to work. This means viewing knowledge as information whether it’s stored and manipulated in a silicon-based system like a computer or a carbon-based system like an employee’s brain. In today’s information intensive environment, human and computing resources need to work together like a cross-functional work team to achieve an organization’s goals and objectives. All too often, an organization’s IT infrastructure is designed and maintained by IT professionals who give line managers what *they* think is needed to operate the business. Savvy top managers know that a high-performing IT infrastructure is a key element of maintaining competitive advantage, so it’s too mission-critical to delegate to IT professionals who often lack an intimate knowledge of an organization’s purpose, goals, structures, systems, and culture. The Breckenridge Institute® can help clients manage their knowledge resources with complete IT solutions for small, medium, and large size organizations. The Breckenridge Institute® has competencies in the following areas:

- Enterprise IT Strategy and Planning
- Custom Software Development
- Custom Database Design using platforms such as Access, SQL Server, or Oracle
- System Documentation and Training
- IT Performance Evaluation
- Independent Validation and Verification of Systems

Business Systems Integration

Studies have shown that 85% or more of the root causes of performance problems are in a company’s structures, systems, and culture, so the seamless integration of business systems is a key element of organizational culture and change. Over time, IT systems, spreadsheets, business processes, documentation, and training become fragmented, disconnected and squander enormous amounts of time, energy, and resources. Business Systems Integration helps identify overly complex systems that frustrate and undermine business performance and create an Invisible Bureaucracy™ of barriers between work-groups and functional units. Our unique approach to Change Management creates a high-performance culture by focusing on both the “hard” technical side of business systems integration, and the “soft” cultural side, using a simple three-step process of: a) identifying all business systems and evaluating their current level of performance, b) reconfiguring and seamlessly integrating them on an

enterprise-wide platform, and c) migrating them back to autopilot operations that produce the desired results. Because it can be used across an entire organization or in work-groups and functional units, Business Systems Integration can be used by top managers or middle managers to seamlessly integrate:

- IT Systems (COTS, Spreadsheets, Shadow Systems)
- Paper Systems
- Operating Plans, Goals, and Budgets
- Customer Feedback
- Enterprise-Wide Business Processes
- Project Management and Work Flow
- Document Library (Policies, Procedures)
- Orientation and Training
- Compliance Systems

It's important to note that the *more defined* the structures, systems, and culture are in an organization the *less impact* sub-cultures and the personalities of individuals will have on day-to-day operations because the differing ways of "seeing" and "doing" get eclipsed by these formal ways of doing business in end-to-end, enterprise-wide business processes. The *less defined* the structures, systems, and organizational climate are the *more impact* sub-cultures and the personalities of individuals will have on day-to-day operations because the informal power and authority of personality fills the void of formal authority and power. In other words, people *are* the process. The question that should be asked by an organization is, *how much of the job gets done* by the formal structures and systems and how much gets done by the informal power and authority of sub-cultures and individual personalities where people *are* the process?

Meeting and Process Facilitation

Facilitation is a core tool and methodology in the Breckenridge Institute's portfolio of professional services because it uses effective patterns of interaction and group-dynamics as a foundation for high-performance. More specifically, we help our clients set goals, identify problems, explore viable options and alternatives, and develop appropriate plans for action. We use a variety of tools and methods for discussion, data gathering, analysis, scenario development, and evaluation of alternatives. This includes multidisciplinary work sessions with stakeholders to clearly identify issues, develop solutions, resolve problems, and build consensus for implementation. Some areas facilitation services include:

- Strategic Planning and Goal Setting
- Project Reviews
- Optimizing Team Performance
- Issue Analysis and Decision-Making
- Conflict Management
- Improving Communication
- Process Analysis
- Teambuilding and Consensus
- Increasing Creative Problem-Solving
- Understanding Group-Dynamics
- Conducting Focus Groups

Training and Mentoring

The Breckenridge Institute® offers a wide variety of training and educational experience in the areas listed below. Our workshops and seminars are tailored to the learning styles, capabilities, and interests of participants and the needs of client organizations. Some areas in which the Institute offers training and mentoring services include:

- Organizational Culture
- Cultural Assessment
- Cultural Change
- Organizational Assessment
- Organization Development
- Strategic Planning
- Change Management
- Human Performance Improvement
- Business Systems Integration
- Leadership Development
- Effective Group Dynamics
- Personality Assessment
- Individual and Group Mentoring and Coaching

Workshops and seminars can be presented at an introductory, college, or graduate level depending on the needs and capabilities of participants and the client organization. These training and educational experiences can also be used as modules in existing training and develop programs offered by client organizations, e.g. leadership development, succession planning, etc.

Staff Members

Mark Bodnarczuk is Executive Director of the Breckenridge Institute® and adjunct faculty member at Colorado Mountain College. Mark has an M.A. degree from Wheaton Graduate School and an A.M. degree from the University of Chicago. He was on the staff at Fermilab from 1980 through 1992, and the National Renewable Energy Laboratory from 1992 until 1996 when he founded the Breckenridge Consulting Group Inc and subsequently the Breckenridge Institute®. Since that time, Mark has provided consulting services for a number of the DOE National Labs including BNL, LANL, ORNL, INL, LLNL, and for DOE up to the Under Secretary (S-3) level, the FDA, and NCI in HHS. Mark has over 20 years of consulting experience in the areas of high-tech, R&D, pharmaceuticals, health care, retail, commercial construction, and resort management, as well as government-funded research in the National Labs, and non-profit organizations. Mark has published numerous articles on organizational culture and organizational development and is the author of four books, including his forthcoming book entitled, *Making Invisible Bureaucracy Visible: A Guide to Assessing and Changing Organizational Culture*.

Elin Larson is Deputy Director of the Breckenridge Institute®. She has a BS degree from Bucknell University and an MS degree from Polytechnic Institute of New York. Elin has over 20 years of experience in consulting, project management and optimizing the performance of business and work processes and business systems integration. She is an experienced assessor in the areas of organizational effectiveness, organizational culture, business systems integration, and change management. Formerly a senior-level DBA with the Oracle Corporation, Elin is an expert in the analysis, design and implementation of database architectures that store and manipulate large data samples using Access, SQL Server, or Oracle platforms. She has designed and built large-complex SQL Server and web-based software applications that are used for data acquisition, data management, business systems integration, and data analysis using advanced analytic tools like SPSS and SAS. Her project management and technical expertise includes Enterprise Data Modeling, Oracle Database Administration, and Computer Aided Systems Engineering in the oil and gas, telecommunications, beer brewing, and software industries and for state and local government agencies.

Ken Dickinson is a Senior Staff Member with the Breckenridge Institute® and has a BBA in Management Science, and an MBA in Management Information Systems from the University of Albuquerque. Ken is a senior executive practitioner with over 20 years experience in IT services and solution sales experience including technical consulting, management consulting, strategist, sales professional, entrepreneur, and full operational P&L management. He has held senior management positions at Insight Investments, Oracle, Burnsand Corporation, Computer Corporation of America, and CGI Corporation. Ken has a broad, multi-industry perspective including financial services, energy, manufacturing, telecom, and healthcare.

John Anderson is a Senior Staff Member with the Breckenridge Institute® and an electrical engineer with over 30 years experience in circuit, software, and systems design. He has managed the design, production, and installation of large scale IT and data acquisition and display systems and is an expert programmer in languages such as HTML, XML, JavaScript, Pearl, PHP, ASP, and SQL. He has a BSEE degree from the Midwest College of Engineering and is a member of the American Society of Safety Engineers.

Anthony Malensek is a Senior Staff Member at the Breckenridge Institute® and adjunct faculty member at Colorado Mountain College. Anthony has a B.S. degree from MIT, an M.S. degree from the University of Chicago and over 25 years of combined experience in financial analysis, tax issues, business investments, project management and the technical use of software to solve complex performance and financial problems. He also has expertise in the design of surveys, diagnostic tools and the use of advanced statistical techniques to analyze data and identify positive and negative patterns of financial and non-financial performance in organizations.

Kass Larson is a Senior Staff Member at the Breckenridge Institute and has over 20 years of experience consulting in business processes management, operations, compliance, technology development, IT infrastructure, and business management software in the pharmaceutical, energy, retail distribution, visual arts, and training industries. His strengths lie in his ability to look at very complex issues from a systems perspective, and then create and implement effective solutions that enable organizations to perform more effectively. Ten years ago he founded Granite Technologies, Inc. with the mission to create a new generation of business management software. Conceptually ahead of its time, Xegy is now taking root as an internet based service software that is helping companies, large and small, define and manage complex business processes without the need for expensive ongoing IT intervention. Kass has a BS in geology from the University of Washington and an MBA in Information Systems from the University of Colorado.

Tom Pazar is a Senior Staff Member at the Breckenridge Institute. Tom has over 25 years of experience as a computer systems researcher and developer. He started his research at Strategy One, a Carnegie Mellon University-based computer systems design and engineering consulting group. While there, he focused on configuration, performance tuning, capacity and disaster prevention/recovery planning of large and complex network computer systems. Tom was instrumental in the architectural design and configuration of local area networks (LAN), metropolitan area networks (MAN) and wide area network (WAN) routers and sophisticated network switches on high-speed data lines. Tom joined Bell Laboratories, the R&D division of ATT and Lucent, as a telecommunications researcher and developer. His primary areas of focus were voice over internet protocol (VOIP), super capacity C/O switching stations, computer based voice, video and application conferencing, and rapid prototype development of wireless mobile computing device interfaces for VOIP and messaging. In 2001, Tom joined Granite Technologies Inc. as the Director of Research and Development to lead the R&D and software engineering efforts. He has a unique ability to see the human-factors of software design before it is engineered, dramatically cutting down the development time for new innovations. Tom has a BS in Computer Science from Duquesne University.

Mark Majors is a Senior Staff Member at the Breckenridge Institute and has over 16 years of experience in psychometrics, organizational consulting, and counseling psychology. He has been a Research Scientist at Consulting Psychologists Press (CPP), and the Director of Research at the Center for Applications of Psychological Type (CAPT). Mark has published widely in the areas of psychometrics, personality type, and counseling psychology and is the author of the Majors' PTI™ and the forthcoming Career Type Inventory™. He received his BS and MS degrees in psychology from Iowa State University and his PhD in counseling psychology from the University of Nebraska-Lincoln.

Bob Dodge is a Senior Consultant at the Breckenridge Institute and the founder of Expert Change Management, LLC. He has owned two consulting companies and has been Director of Consulting Services for LaMarsh and Associates, one of the leading change management consulting companies in the country. He has consulted all over the globe for clients in financial services, education, information technology, health care, defense, consumer goods and manufacturing. Bob has BS degree from Cornell University. He is certified in both the LaMarsh and Prosci methodologies of change management and has nearly twenty years practical experience consulting with large and medium sized businesses and governmental organizations.

David Henderson is a Senior Staff Member at the Breckenridge Institute. He is a teacher, speaker, author, trainer, mentor, and consultant with 20 years of experience in organization development, program design, leadership development, mentoring, and coaching. David is an ordained priest in the Episcopal Church and has extensive experience in church leadership and consulting with congregations on how to develop innovative and creative models of ministry. He has been trained in Clinical Pastoral Education at Yale-New Haven Medical School, has an MA degree from Gordon-Conwell, and an M.Div from Yale.

Kevin Houchin is a Senior Staff Member at the Breckenridge Institute. As a trademark, copyright, and business development attorney with over 15 years of marketing experience, he is uniquely qualified to integrate intellectual property and branding initiatives. Kevin also works with universities, research institutes,

and healthcare organizations to create the kind of cultural change needed to effectively implement HIPAA and IRB requirements, and to build a Just Culture. Kevin has a Bachelor of Fine Art in Graphic Design from Iowa State University and a JD from The University of Iowa College of Law.

Partial Client List

McAfee	Brookhaven National Lab
LogicaCMG	Midwest Research Institute
Lucent Technologies	Los Alamos National Lab
Waterhouse Inc	National Renewable Energy Laboratory
Pacific Health Research Institute	U.S. Food and Drug Administration
Vail Valley Medical Center	Lawrence Livermore National Laboratory
Sandoz	National Cancer Institute
Alpine Link Corporation	Rocky Mountain Oilfield Testing Center
Colorado State University	DOI (National Park Service)
Eagle County Health Services District	DOI (Bureau of Indian Affairs)
Key Source Group	National Institute of Allergies and Infectious Diseases
TCD Inc.	American Industrial Hygiene Association
Breckenridge Associates	Babcock & Wilcox Tech Services Group Inc
U.S. Department of Energy	

Client Comments

"I've engaged the Breckenridge Institute on multiple occasions to work with my senior management teams. They have consistently delivered outstanding results. Through their deep understanding of how culture and the personalities of key personnel impact business performance, they have enabled dramatic improvements. They have helped my organizations remove conflict and enable real synergy in teamwork. I will continue to engage the Breckenridge Institute on a regular basis to help me improve teamwork and business performance. I highly recommend them to any business with people interaction issues or who want to take teamwork to the next level."

Mike Hawkins, CEO Alpine Link Corporation

"RMOTC engaged the Breckenridge Institute to help our organization out of personality driven chaos and into a cohesive and strategically driven company. The insight we gained from BI into human personality and its manifestation in the work place has changed RMOTC dramatically. The intense focus on data driven strategic decisions has shifted the organization from power struggles between differing world views to the common goal of the thriving growth of a new business."

Doug Tunison, Director Technical Services Division, Rocky Mountain Oilfield Testing Center (RMOTC)

"I have been involved with Mark Bodnarczuk and the Breckenridge Institute in a multi-year effort to achieve major transformation at the U.S. government's only operating oil field, the Rocky Mountain Oilfield Testing Center. Although the price of oil had led to increasing demands by industry and government for access to a real-world environment for evaluating new energy technologies, we were finding that old schisms were making it all but impossible to rise to new business opportunities. We had tried a number of consultants and techniques to improve but nothing seemed to help for more than a few days. Mark convinced us that a much greater and more sustained effort was required to achieve the kind of makeover we wanted. This led to the most sophisticated and effective change process I have experienced in 35 years as a manager. It is hard, now, to imagine how we were able to function at all, much less achieve desired changes, without benefit of the insights, training, and tools he provided for using human behavior principles to achieve desired business outcomes. In further testimony to their power, I found his teachings to be equally beneficial outside the workplace. To those willing to include the hard work of changing their own belief systems as part of the changes they desire in the workplace or in their personal relationships, I cannot over-state the value of services offered by the Breckenridge Institute."

Jim B. States, Ph.D.
Program Manager, Rocky Mountain Oilfield Testing Center

"The Breckenridge Institute helped design and facilitate last year's annual retreat for our 30 managers around the topics of business strategy, our economic driver, and the foundations of leadership. It was one of our best retreats! Their knowledge about organizations combined with their insight into leadership and effective communication were a great combination. The action plans that resulted and the focus on our economic driver have had a positive impact on our business success."

Mike Millisor, President, Grand Timber Lodge Resort

"Mark Bodnarczuk at the Breckenridge Institute has a keen ability to assess the strengths of highly technical individuals and to leverage those talents in a multifaceted, professional organization. He is an outstanding facilitator of complex meetings and is terrific in identifying the critical underlying issues that are the real source of the organizational problems. His use of personality type as the basis for recognizing and solving critical workplace conflicts leads to the creation of an energized, productive work environment. Mark has a deep personal commitment to me as a customer and to adding value to our organization."

Paul Seligman, MD, MPH, Director of the Office of Pharmacoepidemiology and Statistical Science, U.S. Food and Drug Administration.

"As a senior manager, I've always believed that self-development is an important part of professional development. Over the years, I've read many books, taken numerous seminars, and participated in various coaching exercises, but the Breckenridge Institute's approach to executive coaching has helped me the most! Real growth can be obtained only through true self-discovery and Mark Bodnarczuk helped me reach new levels of self-awareness. No other process went this deep. It's had a positive impact on my professional life by making me a more confident and effective leader and by giving me a deeper sense of meaning and purpose in my work."

Jim Tarpinion

Associate Director for Environment, Safety, Health and Quality, Brookhaven National Laboratory

"Mark Bodnarczuk and the Breckenridge Institute possess unique talents that are virtually unattainable elsewhere. My firm was retained to provide a culture assessment and change management plan for the prime contractor managing one of the Department of Energy's premier National Laboratories. I invited Mark and his firm to collaborate with us on the project. His contributions to the project were exceptional - - insightful, intuitive and very much on target with a keen sense of understanding client dynamics within the executive ranks. We have the good fortune of continuing to work with Mark and the Breckenridge Institute, as they are a pleasure to work with and have delivered consistently great results."

David Ralston, Co-Founder & CEO, The KeySource Group Inc.

"As the Managing Broker, I felt I needed to bring the Breckenridge Institute in because our business was feeling some growing pains as we became more successful. They were able to work with all of us on the levels we needed, support me in making decisions, keep us on top of our business, and give us the tools we needed to stay in that position. We were able to find the root causes of our company's issues, get them to the surface, and then create a consensus with our group to make forward thinking decisions to positively affect how our business operates. Because of the Institute's work with us, our partnership has developed better communication skills and a more team-oriented approach to how we do business. I truly would recommend the Breckenridge Institute to any organization whether you are just starting out or whether you have been in business for a long time. They will truly take you to the next level in your field."

Lisa Bova

Managing Broker, Breckenridge Associates Real Estate 1999-2004

"The Breckenridge Institute was engaged to help Pacific Health Research Institute (PHRI) restructure and reorganize the Institute during the early phases of a difficult merger of two "Mom & Pop" research organizations with very different cultures. They identified and sorted out the critical underlying organizational issues and problems that facilitated this process. The firm demonstrated an ability to facilitate difficult and complex meetings with individuals and groups representing a variety of disciplines. Their expertise in the

tools of organizational development and ability to apply them to a scientific environment allowed us to rapidly develop and implement a sophisticated and successful business model. As a result PHRI's annual research awards increased by a factor of five over an eight-year period. Throughout the process the Breckenridge Institute demonstrated a high level of responsiveness and commitment to PHRI and its management.”

J. David Curb, MD, MPH
President, CEO & Medical Director, Pacific Health Research Institute

“The Breckenridge Institute’s approach to organizational strategies is powerful and enlightening - a must for any business or organization that wants to better understand how they are presently operating or to operate at a higher level. The time management module that the Institute provided to our team has had an extremely positive effect on productivity and efficiency. They also helped our senior managers build a powerful team that truly understands what it means to be philosophically aligned, on the same page, or as Jim Collins puts it, to be on the same bus. Whether it was positively managing conflict, understanding personality types or executive coaching, the Institute brought a level of commitment and passion to their work with us and helped TCD to grow and prosper using the timeless principles of excellence.”

Rick Brodie
President, TCD, Inc

“Mark Bodnarczuk of the Breckenridge Institute facilitated organizational design and planning sessions that unlocked the real issues of our organization allowing us to provide meaningful solutions resulting in cost savings over \$2M. In addition, the independent verification and validation efforts by the Breckenridge Institute provided valuable insight and recommendations. Mark’s integrity, character, and ideals deliver superior quality backed by a solid reputation.”

Charlie Stone
Associate Director, FDA, Office of Surveillance and Epidemiology

“Following a broad institutional reorganization, I engaged Mark Bodnarczuk of the Breckenridge Institute to assess the resulting organizational issues in my Division. Mark’s science background along with his understanding of individual human behavior in scientific organizations enabled him to get quickly to the heart of the organizational conflict. He understood the personalities involved and facilitated communication in a way that diffused charged issues and focused on opportunities for change. Mark presented his findings and recommendations to our Division in an engaging manner that delivered difficult messages effectively and promoted an improved culture of respect and teamwork. In addition, Mark is also a very talented leadership coach. His guidance and advice have enabled me to become a more effective leader as a Division Director and in my subsequent executive positions.”

Faye C. Austin, Ph.D.
Former Director, Division of Cancer Biology, National Cancer Institute, NIH

“Mark Bodnarczuk of the Breckenridge Institute was able to excite and engage our faculty at last year’s departmental retreat like few other facilitators could. His science background and ability to perceive science faculty needs and goals as they relate to the organizational structure were truly remarkable. I received positive feedback and comments such as, ‘Most effective facilitator I’ve ever interacted with!’ and ‘He (Mark) really got me thinking about how to align my career goals with the Department’s goals.’ With Mark’s expert facilitation, we accomplished much more during our retreat than would have been possible without him. I can recommend him without reservation to other universities, research institutes and technical organizations which need a science-savvy facilitator for strategic planning and bringing about effective cultural changes.”

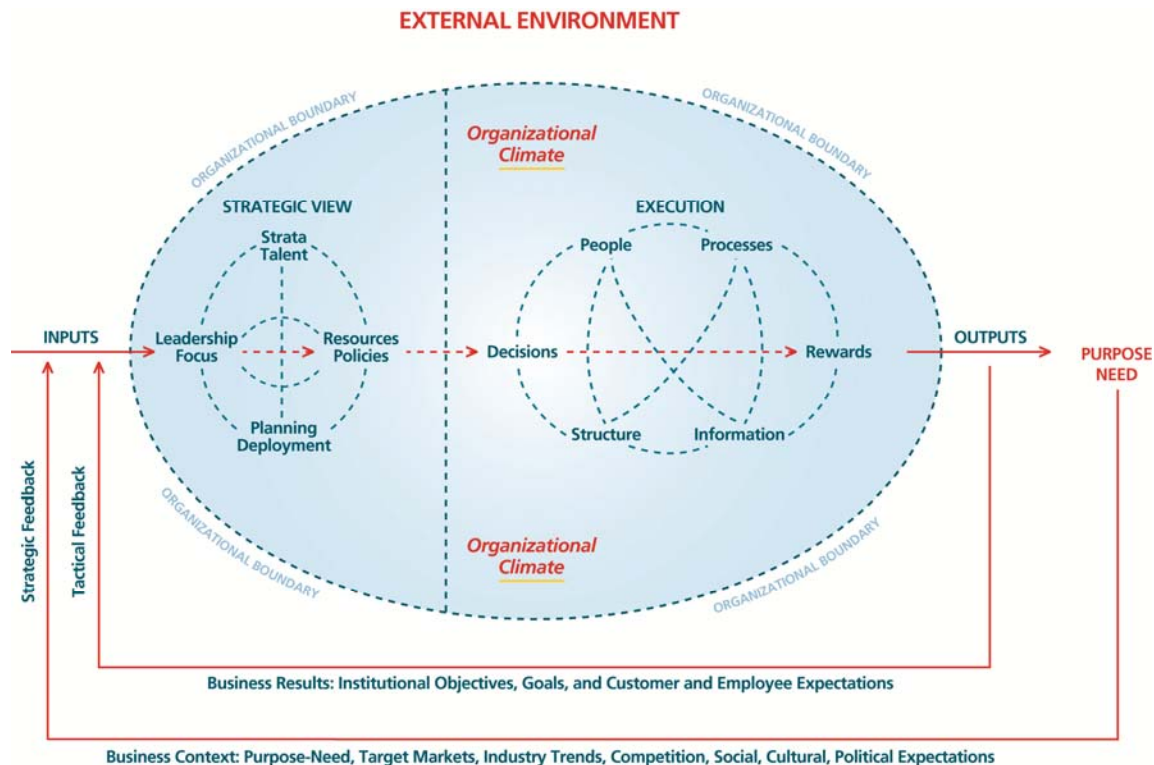
John Zimbrick, PhD, Head
Environmental & Radiological Health Sciences Department
Colorado State University

Examples of Previous Projects

1. The Breckenridge Institute® designed and led an organizational assessment and business process reengineering project for the DOE Office of International Health Program's Marshall Islands (MI) environmental and radiological monitoring programs at Lawrence Livermore National Laboratory and Brookhaven National Laboratory, respectively. We designed and performed organizational assessments that allowed DOE to evaluate a) the overall scientific direction of the programs, b) barriers to increased efficiency of program performance, c) problematic organizational interfaces, d) communications between DOE and contractors, and e) ways to improve interpersonal relationships. The Institute subsequently designed and led a series of strategic planning workshops that refocused the scientific mission and functionally integrated the two programs which resulted a) in a more clearly focused mission, b) a reengineered program that eliminated duplicate processes (especially logistics), c) improved organizational and interpersonal communication, d) and financial savings of about \$650,000 per year.
2. The Breckenridge Institute® designed and led an organizational assessment and business process reengineering initiative for the Midwest Research Institute (MRI). The BPR process reengineered the organization's a) financial information system, b) information technology system, c) sample and reagent tracking system, and implemented an Institute-wide performance-based management system (Balanced Score Card). This enabled MRI to link corporate and department level goals to the goals of each person in the company with a redesigned employee performance appraisal system. These projects resulted in the elimination of duplicate processes, reports, and functions spread between organizations. The financial savings resulting from the newly designed sample and reagent tracking system alone was over \$250,000 per year.
3. The Breckenridge Institute® designed and led an organizational assessment and interrelated series of corrective action workshops on customer service, satisfaction, measurement, and improvement for Lucent Technologies. The workshops presented a set of conceptual, analytic, and practical tools for improving interactions with customers. As indicated in anonymous written evaluations, attendees increased their professional skills in the areas of root cause analysis, customer interfacing based on quantitative measures, interpersonal communication, and managing conflict.
4. The Breckenridge Institute® designed and performed an organizational assessment of the National Cancer Institute's (NCI's) Division of Cancer Biology which evaluated organizational structure and alignment; planning and decision making; communications and information flow; policies and procedures; professional development; and cultural values following a restructuring that merged two former NCI divisions. The Institute used the assessment results to design and lead follow-up planning workshops to establish the mission, client base, and services provided by the Division's six disciplinary branches. In addition to improved work efficiencies and morale, these activities resulted in an improved understanding of the scientific interrelationship between diverse programs in genetics, immunology, virology, chemical carcinogenics, and radiation effects research.
5. The Breckenridge Institute® conducted an organizational assessment and reengineering effort for the Pacific Health Research Institute (PHRI). The corrective action process resulted in the reengineering of organization-wide structures, systems, and culture, plus the work processes in all four of PHRI's Divisions, and developed performance measurement at the organization-wide, Division, and Department levels. This enabled PHRI to link Institute, Division, and Department goals to all employee performance appraisals. The Breckenridge Institute's activities also resulted in PHRI operating more like a business rather than the traditional approaches to non-profit research organizations. This gave PHRI an enormous competitive advantage over more traditional research institutes.
6. The Breckenridge Institute® designed and led the Organizational Design and Planning Process (ODP) for the US FDA's Office of Pharmacoepidemiology and Statistics (OPaSS). An initial organizational assessment led to the development of the ODP process for the Adverse Event Reporting Systems (AERS), an Oracle-based computer system that over 200 FDA employees use to identify and analyze serious post-marketing drug incidents, including fatalities. Through a series of focus groups and consultations, the Breckenridge Institute® led the process of gathering requirements for an improved AERS system that resulted in a list of high-level and system-level specifications and requirements.

Our Approach and Model

The Breckenridge Institute® uses an Open Systems model of organizations as a foundation for working with client organizations. More specifically, in a one-person company, the owner has to perform every function that is performed. They have to obtain materials from suppliers, fabricate products and deliver services, get customers to buy their products and services by raising awareness through marketing and then selling products and services to interested customers. The owner also has to perform all financial management functions which can be reduced to two kinds of dollars: those that come in as revenue and those that go out as operating expenses. When a one-person company grows into an organization of 25, 100, 500, 1,000, or 10,000 people, the tasks, functions and decisions that an owner once made by themselves are now delegated to groups of people as the structures, systems, and culture shown in the oval diagram below.



The figure above depicts the structures and systems of an organization as an organic, process-oriented system that exists within the context of organizational climate and culture, and is open to influences of the business environment upon which it is dependent for its survival. All living systems are composed of patterns and structure that are linked together by dynamic processes. On the open-systems view, organizations are like organic, living, goal-seeking organisms where their structures and systems reach a state of equilibrium within the context of their internal climate and the forces and pressures from business environment outside the organization. As David Hanna puts it, "All organizations are perfectly designed to get the results they get! For better or worse, the system finds a way of balancing its operation to attain certain results." The diagram above has three main elements:

- Strategic View
- Execution
- Organizational Climate

An organization's Strategic View defines the overall direction, goals, and objectives of the organization, given its purpose in the external environment. Execution reflects the structures and systems needed to carry out and implement the organization's plans, goals, and direction. Organizational Climate is the experience that

people have working in an organization day-to-day. Climate is also a reflection of the underlying, tacit assumptions that compose an organization's underlying cultural norms. Perhaps the greatest value in using an open-systems model to analyze and characterize an organization's culture is that it provides a framework for focusing cultural assessments on: a) addressing the specific challenges or issues that the organization is facing, b) improving business processes and tangible work practices, and c) helping organizations to get the results they want. The Institute's portfolio of tools enables clients to obtain a comprehensive quantitative analysis of their entire system.

Publications

The Building Blocks of Organizational Culture – Part 1 – Patterns of Interaction
(<http://ezinearticles.com/?id=832144>)

Struggling Against the Invisible Bureaucracy of Organizational Culture
(<http://ezinearticles.com/?id=825310>)

The Culture Equation: Taking the Mystery Out of Organizational Culture
(<http://ezinearticles.com/?id=825466>)

Four Global Forces that Will Shape Organizational Culture for the Next 50 years
(<http://ezinearticles.com/?id=826194>)

When It Comes to Organizational Culture, What You See Is What You get
(<http://ezinearticles.com/?id=839838>)

Four Criteria for Evaluating Organizational Consultants
(<http://ezinearticles.com/?id=923588>)

Four Ways of Working as Generic Cultural Norms
(<http://ezinearticles.com/?id=923600>)

The Organizational Trust Index™ as a Window into Organizational Culture
<http://ezinearticles.com/?id=1085113>

Four Dimensions of Leadership
<http://ezinearticles.com/?id=1090117>

Some Sociological Consequences of High-Energy Physicists' Development of the Standard Model
(<http://www.breckenridgeinstitute.com/sociological-consequences.pdf>)

Island of Excellence (http://www.amazon.com/Island-Excellence-Mark-Bodnarczuk/dp/0975511513/ref=sr_1_2?ie=UTF8&s=books&qid=1195229566&sr=8-2)

The Rise of the Standard Model (http://www.amazon.com/Rise-Standard-Model-History-Particle/dp/0521578167/ref=sr_1_1?ie=UTF8&s=books&qid=1195666535&sr=1-1)

Diving In (http://www.amazon.com/Diving-Mark-Bodnarczuk/dp/0975511505/ref=sr_1_1?ie=UTF8&s=books&qid=1195229566&sr=8-1)