

Jeff Berlin

CONSULTING

CAPABILITY STATEMENT
FEBRUARY 2024



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COMPANY INFORMATION

- Jeff Berlin Consulting, LLC
- Established August 2019
- Proudly based in Haleiwa, Hawaii
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- Phone Number: (910) 297-3651
- Email Address: jeff@jeffberlinconsulting.com
- Website: www.jeffberlinconsulting.com
- FEIN: 84-2652913
- GE License: 180-757-1456-01
- Fully insured

CONSULTING SERVICES

Jeff Berlin provides organizational development (OD) consulting services to individuals, teams, organizations, and communities located primarily in Hawaii and the continental USA. The goal of OD is to maximize the potential of people and organizations using change strategies based in the social sciences. As a strategic partner, Jeff offers the following services:

- Leadership and executive coaching (Certified by International Coaching Federation)
- Leadership development
- Team building and coaching
- Training and facilitation
- Research and needs assessments (surveys, interviews, and focus groups)
- Public speaking
- Talent strategy development
- Change management
- Cultural transformation
- Writing and editing

ABOUT JEFF BERLIN



Jeff Berlin is passionate about facilitating positive change with individuals, teams, organizations, and communities. He started this consulting company to enhance people's experience at work and in life more generally. When people are engaged and satisfied with their job, they are more positive individuals, friends, parents, partners, and community members. Focusing on the people-side of organizations has a broader influence on community health and well-being. It's also good business.

The way people work is changing and for companies to recruit, engage, and retain top talent, they need to change with the times. Jeff facilitates these processes by blending a diverse academic background with a practitioner's orientation towards action and results. This helps strike the balance between deep academic analysis and the day-to-day realities and needs of business leaders.

He and his wife are happy and humble to live on the "north shore" of Oahu. In their free time, they enjoy spending time with family and friends, being active in and out of the ocean, reading, writing, traveling, and listening to their record collection.

Consulting Strengths and Values

- Expertise in organizational, cultural, and community psychology
- Coaching, mentoring, and advising leaders, teams, employees, and students
- Small and large group facilitation, training, and speaking
- Leadership development
- Research, writing, and editing
- Organizational culture and change management
- Collaboration, creativity, and innovation
- Integrity, authenticity, empathy, and trust
- Humor, enthusiasm, and passion
- Social, cultural, community, and environmental justice

PROFESSIONAL EXPERIENCES

Jeff Berlin Consulting

Owner and Principal Consultant

August 2019 - Present

Hawaii-based OD company primarily offering the following services: organizational research and needs assessments; facilitation, learning, and development; leadership and team coaching; change management; cultural transformation; leadership development; and talent strategy development.



American Savings Bank

Organizational Development Advisor

December 2017 – May 2020

Internal OD consultant responsible for change management and leadership development programs. Served as a key change management leader in the move to a new open-office campus, managed the company's leadership 360 feedback program, conducted 100+ leadership coaching sessions at all levels, and designed and facilitated 60+ leadership development sessions.



Bank of Hawaii

Senior Organizational Development Specialist

July 2015 – December 2017

Internal OD consultant responsible for change management, leadership development, organizational research, training and development, and strategic advising. Conducted two award-winning OD projects with large revenue-generating divisions resulting in significant change.



University of Hawaii at Manoa

Numerous positions

August 2010 – May 2015

Worked part-time as an OD consultant and research assistant during doctorate program. Key projects and responsibilities included coordinating and facilitating multiple public health efforts across the state, running the student advising center, supervising undergraduate research students, and developing teaching programs.

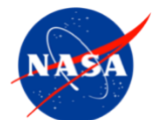


National Aeronautics and Space Administration

Organizational Development and Training Specialist

November 2006 – April 2010

Internal consultant responsible for organizational, leadership, and strategic development projects. Developed numerous award-winning programs, including multiple agency-wide culture surveys and senior executive succession planning programs. Ran multiple leadership development programs and received performance awards every year.



PROFESSIONAL AWARDS

- Hawaii Pacific Business News Magazine 40 Under 40 Award (2021)
- Bank of Hawaii Chairman's Award for two OD projects (2015)
- NASA Superior Accomplishment Award for management of Ames Culture Survey (2009)
- NASA Certificate of Appreciation for service to the Ames African American Advisory Group (2009)
- NASA Spotlight Award for Senior Executive Service Pipeline Workshops (2008)
- NASA Culture Study Award for co-management of agency-wide culture survey (2007)
- NASA Performance Awards (2007, 2008, 2009)
- Dean's List for Academic Achievement, University of North Carolina - Wilmington (01-05)

ACADEMIC BACKGROUND

PhD, Community and Cultural Psychology (2015)

University of Hawaii at Manoa



Dissertation: *Beyond Intercultural Competence: Global Citizenship and a Critical Study Abroad*. A critical analysis of the study abroad industry and investigated the relationship between studying abroad and global citizenship development. Data included 571 survey responses and 34 interviews.

Graduate Certificate, International Cultural Studies (2013)

East/West Center



Capstone: *Indigenous Representation in Study Abroad: A Case Study of Hawaii*. An in-depth analysis of indigenous representation in Hawaii and specifically critiqued representations of Hawaii as a "study abroad destination."

MS, Industrial/Organizational Psychology (2008)

San Jose State University



Thesis: *Social Support and Facet Satisfaction Across Cultures*. Investigated the relationship between organizational social support and job satisfaction across 14 nations and included survey responses from 45,000 employees.

BA, Psychology (2005)

University of North Carolina at Wilmington



Emphasis in cultural, community, social, and industrial/organizational psychology.

CLIENTS AND PARTNERS



COACHING



Jeff is an Associate Certified Coach through the International Coaching Federation, the international standard for coaching accreditation. Jeff's approach to coaching is based on formal training in [Organization and Relationship Systems Coaching](#), an extensive and diverse academic background in psychology, and 18 years of organizational development consulting experience. He has partnered with leaders of all levels in a wide variety of industries and companies throughout the state of Hawaii and beyond.

Approach:

Establishing a strong, trusting, and confidential relationship with clients is essential in fostering a safe space for leaders to be their authentic and whole selves. When a leader connects with their values, motivations, goals, strengths, and challenges, it creates a solid foundation upon which growth possibilities are endless. Providing a balance of assertive challenge and compassionate support, Jeff serves as a trusted partner to leaders along their developmental journey.

Testimonials:

"I am just so grateful for the work you have done with us and for us, and I want others to be able to enjoy the fruits of working with you! If you're in search of a leadership/executive coach for yourself or for your team, I highly recommend hiring Jeff Berlin. I hired Jeff to coach a member of my team, and I am incredibly grateful for the deep care he took in his approach to our needs. I felt "seen" as a client. In that sense, while I wasn't the focus of the coaching, I felt like a direct beneficiary. So I would say that under Jeff's tutelage, I gained and grew as a leader and manager too. Working with Jeff greatly enhanced my appreciation for having someone come in and support me as I endeavor to develop and strengthen a high-functioning team. There is no substitute for a coach that you can rely on when you want to do better and be better. Jeff was a strong fit for my needs, and I hope others will look to him for his coaching services and experience the benefits that we did!"

Vice Provost for Enrollment Management

"Jeff and I first met through the executive mentoring program at Shidler Business School and agreed to "barter" our services. I provided some marketing guidance and Jeff provided some leadership coaching. He was going through certification at the time and I was happy to help him

practice. After a few months, I found the coaching so valuable I wanted Jeff to officially “be my coach.” Therefore, we transitioned into a more formal client engagement.

Jeff’s coaching helped me to discover hidden parts of myself that are key to connecting with others and leading a team. I now feel empowered to bring all parts of myself to work that allow me to have better relationships with my team. His personality and style made our time together an easy and enjoyable experience. He’s down to earth, positive, challenging, kind, compassionate, thoughtful, responsive, organized, and has a great sense of humor. He also brings deep and varied expertise to this work. I now consider Jeff a friend and would highly recommend him as a leadership coach.”

Mikaela Bolling, Co-Founder of Brilliant Marketing

***Additional references available upon request**

CONSULTING PROJECT EXAMPLES

As a boutique consulting firm, Jeff works closely with clients to customize the approach and relevant solutions. Below are a few examples of projects:

Client	Project
Graduate School USA	<p>Leadership Development Manager and Coach</p> <p>Partnering with Graduate School USA to offer the Executive Leadership Development Program (ELDP). The ELDP is the premier leadership development program for government employees throughout the US Affiliated Pacific Islands. Each year, roughly 25 senior leaders join this year long program from American Samoa, Guam, Commonwealth of Northern Marianas Islands, Republic of the Marshall Islands, Republic of Palau, and Federated States of Micronesia.</p>  

Ko'olani Condominium

Employee Satisfaction and Retention Initiative

Partnered with the General Manager to conduct leadership alignment sessions, interviews, and develop a survey process conducive to the unique attributes of the organizational culture. Below is the GM's testimonial:

"Jeff Berlin Consulting assisted our organization with our employee satisfaction and retention effort. He worked closely with the general manager and leadership team to develop a culturally appropriate survey process. This helped us determine the concerns and areas of satisfaction our staff were experiencing.

Whereby staff members may have felt uncomfortable to address delicate situations with their peers or supervisors, Jeff was able to a) create a safe space for all of us to anonymously express our honest opinions resulting in a 91% response rate, b) turn our responses into actionable steps our management team could take to address concerns and c) determine how to maintain the existing business practices everyone enjoyed and appreciated.

Staff satisfaction, retention, and the ability to attract qualified candidates are critical for any business to succeed. Employee turn-over is expensive, time consuming, and detrimental to morale and service levels. Jeff's organizational development expertise improved our work environment and taught us how to be more supportive and conscientious of the needs of our staff. What we learned from Jeff Berlin Consulting will go a long way towards maintaining high levels of satisfaction, staff retention, and attracting qualified candidates."

Hawaii Employers Council

Wrote articles for leaders and business owners responding to COVID-19:

- [Tips for Leading Through Uncertainty](#)
- [Returning to the Workplace: Administrative and Strategic Considerations \(Phase 1\)](#)
- [Guide to Returning to the Workplace: Organizational Effectiveness \(Phase 2\)](#)

Conducted an Organizational Effectiveness Research Project:

- [Organizational Effectiveness Survey – 113 Hawaii Companies](#)
- [Organizational Effectiveness Interview – 29 local leaders](#)
- Research Webinar [Recording](#) and [Slides](#)

Executive team-building sessions using DISC and Five Behaviors
Conducted employee engagement learning circles

Research Corporation of Hawaii

Conducted literature review on Positive Youth Development and Youth Leadership Development for a Native Hawaiian Cultural Case Study Project. In collaboration with community members, this program developed and evaluated [Puni Ke Ola](#), a community-based substance abuse prevention and leadership development program on Molokai.

Developed a program manual to expand *Puni Ke Ola* to other Native Hawaiian communities across the state. Also writing a manuscript of lessons learned for submission to the journal: *Progress in Community Health Partnerships: Research, Education, and Action*.

WORKSHOPS, PRESENTATIONS, AND INVITED TALKS

Workshop Examples

Leading Change in Organizations

Executive Leadership Development Program. Graduate School USA (full day)

"Jeffrey was an awesome presenter. I enjoyed the breakout sessions that led to the many wonderful discussions about culture in our organizations. I appreciate having the slides and workbook sent ahead of time to guide my thinking for the presentation."

"Really appreciated the energy of the presenter and ensuring that everyone had an opportunity to speak. I enjoyed the full discussion of culture in our organizations."

Learning to Lead: Fundamentals of Leadership

University of Hawaii at Manoa Outreach College (full day)

"Professor Jeff was very informative and a very bright individual. He made a really great impression on me and I would highly recommend this course to my friends for their professionalism. Thank you Jeff!"

"Jeffery was very welcoming. His pacing on the information was just right. His upbeat positive and friendly persona made me feel comfortable and the information conveyed was relatable. His worksheets, shared presentation materials, links to relative information, and his breakout sessions were invaluable."

"He was AWESOME! Jeff Berlin the instructor for the course did an excellent job facilitating the course. He was very high energy and got the class participating throughout with the use of surveys and breakout sessions. He did a great job giving us the opportunity to work with other course participants. Jeff did a great job making the course exciting and relevant."

Putting People First and the Four-Way Win

Republic National Distributing Company (half day)

Building your Remote Work Strategy

Hawaii Employers Council (half day)

"Love Jeff's style of presentation and his many models to help from understanding of complex concepts to simple perspectives."

Beyond Intercultural Competence: Global Citizenship and a Critical Study Abroad

NAFSA: Association of International Educators Conference

"Jeff has a great presentation style. Not only does he have great content to share, he is able to present it in a warm, personable way even in a virtual environment! I really enjoyed this session."

"Jeff was an awesome presenter! He had a lot of information to cover but did a great job discussing the most important/salient points for this particular audience. A wonderful, engaging presentation!"

"Excellent speaker. Very enthusiastic and easy to listen to, not to mention very knowledgeable. Very much enjoyed this session."

Remote work and Global Citizenship - [Link to recording](#)

Menlo College Career Connect Day

"Great speaker, great engagement, great presentation"

"I felt like this was a very informative discussion that really enlightened me on many of the new business and employment trends and how they can impact the satisfaction of the employees and the success of the company. In this discussion, they also made quite an effort to engage the students through methods like polls."

Select Presentations



Invited Talks

Innovative Organizations, Talent, and the Four-Way Win

Shidler Business School – Executive Mentoring Program (EMERG)

Graduation Commencement Address

Executive Leadership Development Program - Saipan

Putting People First for the Win

Hawaii Food Industry Association – Keynote Speaker

HFIA: The Next 50 Years

Hawaii Food Industry Association – Interactive Keynote Speaker

The Feedback Question: To Share or Not to Share?

Simply Feedback Podcast – [Link to Recording](#)

Changes Abound: Navigating the Future Together

Society for Human Resource Management Annual Conference

The Role of People in Leading Successful Change

Hawaii Association of Independent Schools

How to Feel in Control in Times of Change

Hawaii Society of Business Professionals

Navigating the Seas of Change

Aloha Society of Association Executives

Navigating Through Change

Honolulu Japanese Junior Chamber of Commerce

Breaking Down the Notion of Professionalism

Business Executive Society of Tomorrow

The Leadership Journey

*Business Executive Society of Tomorrow
Society for Human Resource Management*

Beyond the Shock: Accepting and Leveraging Remote Work

Shidler Business School – Executive Mentoring Program (EMERG)

Beyond the Shock: Accepting and Leveraging Remote Work

Hawaii Employers Council – Link to [Recording](#)

Organizational Culture

Shidler Business School – Executive MBA Program

Organizational Culture and Change

Shidler Business School – Family Business Center of Hawaii

Global Citizenship and a Critical Study Abroad

Generation Travel Radio – Podcast- [Link to Podcast](#)

VOLUNTEER HIGHLIGHTS

Jordan and Cara Odo Scholarship Foundation

Strategic Director for Leadership Development and Mentoring

The first pilot program served a group of students from Kahauiki Village. These students identified solutions to primary issues facing their community and were all awarded scholarships.

The second program was expanded to include 19 students and pivoted around the COVID-19 pandemic. As internships were being canceled across the state, the team created an innovative Virtual Internship Program. This five-week program was designed to give students firsthand career experience and develop solutions to community issues resulting from the pandemic. Students worked in department groups with senior leader volunteers and capstone project teams. Students presented their final projects to an esteemed panel of Hawaii's senior leaders and all received an on-the-spot scholarship.

The third program, Next Gen Leaders, was expanded to 8-weeks and consisted of career and leadership mentoring groups, capstone projects contributing to Hawaii's 2.0 initiative, and weekly talk story sessions with

	<p>senior leaders in our community. The three capstone team topics include tourism and environmental sustainability, racial and social justice, and homelessness. Each student was awarded two, on the spot scholarships from the esteemed panel of judges. Here is an article published in Shidler News.</p> <p>The fourth program focused on leadership development, mentoring, networking, and capstone projects investigating the housing crisis in Hawaii. Program alumni joined the leadership team to help administer the program.</p> <p>The fifth program included 16 students focused on access to healthcare in Hawaii. The student teams partnered with four of the largest health-care organizations in the state and presented their projects to a panel of executives. A student leadership team of five program alumni were responsible for innovation and successful execution of the program.</p> <p>The sixth program will focus on how Artificial Intelligence can benefit the people of Hawaii.</p>
<p>International Coaching Federation</p>	<p>Founding Executive Board Member</p> <p>With five executive board members, co-founded the first ever Hawaii chapter of the International Coaching Federation.</p>
<p>AccesSurf Hawaii</p>	<p>OD Consultant Intern / Volunteer</p> <p>AccesSurf Hawaii is an organization specializing in providing beach and ocean access to individuals with disabilities. Volunteered as a “surf instructor” taking individuals into the waves for tandem surfing. Worked as an organizational development intern with the Founder and CEO to assist with the development of the organization for expansion. In the words of the CEO, high level outcomes included:</p> <ol style="list-style-type: none"> 1) developing a survey for all participants and volunteers 2) assisting CEO in determining the future direction of AccesSurf 3) creating a strategic plan for AccesSurf for the next two-year period 4) becoming a strong, key volunteer with AccesSurf programs.