

DESIGN

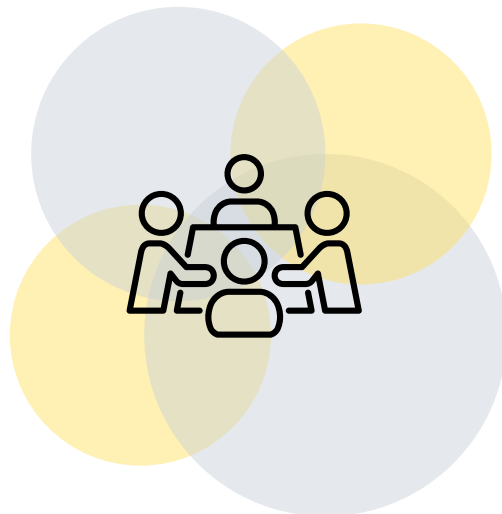
Convo

LLC

Human Centered Strategy & Consulting

Design Convo LLC

Human Centered Strategy and Consulting



Helping organization and leaders get back to what really matters and works: *collaborative conversations!*

Our Organization

DesignConvo, a **female-owned and led consulting firm** based in Phoenix, Arizona, is a recognized leader in leadership development, human-centered strategy and strategic planning, and meeting design and facilitation. Founded by Dr. Cary Lopez, PhD (PMP, CCMP, CPA) and Anca Castillo, (MS), DesignConvo is driven by our **shared passion for innovative conversation design**, with a focus on bringing humans back to the center of what works and what matters: *collaborative conversations designed to bring about positive change.*

With over 15+ years of executive facilitation, organizational design, strategy, and organizational change management expertise, Cary and Anca form the dynamic force behind DesignConvo's success. Our vision is to **empower organizations by placing humans at the heart of their strategies**, navigating complex challenges, and achieving sustainable growth.

We believe in an abundance mindset and partnering with experts. When engaging in new projects, we seek out skilled professionals to expand our own network, and grow the opportunities available to support clients. We ensure our partners are seasoned consultants with a diverse range of expertise, including strategy, design thinking, organizational change, cultural intelligence, capacity building, leadership development, and digital innovation. Through the combination of these perspectives, we **create holistic solutions that blend human insights with cutting-edge technology**, unlocking new possibilities for teams and organizations.

At DesignConvo, we understand the power of human communication and behavior. We guide organizations in crafting strategies that deeply resonate with their target audiences, fostering meaningful connections that drive success. Our success is built upon **cultivating strong relationships** and working closely with teams to **create cultures that thrive on collaboration.**

Over the years, we have had the privilege of working with a wide range of clients, including higher education institutions, non-profits, for-profit organizations, government agencies, and Fortune 500 companies. Notable partnerships include Starbucks, Sedona Police Department, YSEALI, USA Triathlon, Aramark, Special Olympics, The Wellbeing Collaborative, Mayo Clinic, Blue Cross Blue Shield, NARBAH Institute, Scottsdale Unified School District, Stanford University, Northern Arizona University, Arizona State University, Arizona Innovation Alliance, and the City of Chandler.

With our team's expertise and unwavering passion, DesignConvo is dedicated to **driving positive change through the strategic design of collaborative conversations.** We think you will find our qualifications and past experiences demonstrate our capabilities to meet your needs. We are excited about the opportunity to bring our expertise in stakeholder engagement, meeting design and facilitation skills, strategic identity and mission/vision design, and experience in using technology to facilitate stakeholder input to support organization's needs as they seek to craft a strategy.

The Team



Cary Lopez
Co-CEO



Anca Castillo
Co-CEO

Brief Biographies of Project Team

Our team comprises highly skilled professionals with diverse expertise, ensuring comprehensive coverage of key areas essential for the success of the project. Each team member brings unique insights and specialized knowledge to deliver exceptional results. Below is an overview of the team members we expect to staff for this project, and their areas of specialization. Detailed resumes are included in the appendix:

Anca Castillo: Anca is a human-centered design expert, executive coach, and strategic storyteller. Anca is one of a few people certified to facilitate the Storytelling Leaders program. Through this interactive program Anca has helped hundreds of leaders across the US to leverage the power of storytelling to engage and influence others authentically. Anca has also trained and certified 500+ higher education leaders in facilitation and has taught facilitation courses at Arizona State University. In 2021, Anca crafted a bespoke leadership program at Arizona State University for university presidents focused on helping higher education leaders think like designers. Her expertise in facilitation, process improvement, and program management enables her to craft social designs that unite diverse stakeholders to shape preferred futures. Anca is certified in the *Ideo Strategy by Design* course, and uses her skills in human-centered design to help organizations craft strategies that are meaningful and impactful for their stakeholders.

Cary Lopez, Ph.D: Cary is an organizational transformation expert and master facilitator with a strong track record of utilizing human-centered frameworks and collaborative inquiry skills to craft strategy. Cary has helped organizations of all shapes and sizes craft meaningful identities, missions, and visions, culminating in powerful strategies to move forward. With extensive experience in HR, Cary brings a comprehensive understanding of organizational dynamics and effective leadership strategies. Her Ph.D. research focused on the co-creation of hope in teams, emphasizing the importance of fostering positive and purpose-driven environments. Cary's facilitation approach empowers organizations to navigate complexities, nurture collaboration, and inspire transformative change, making her an invaluable asset to DesignConvo's team.

SERVICES AND OFFERINGS

Our consulting & transformation services

Our Approach

We are process experts and catalysts for innovation. Rather than simply solving problems for our clients, we empower groups to discover their own unique solutions and make informed decisions. Through our facilitation and guidance, we foster a collaborative environment that unleashes the collective intelligence and creativity of the organization, driving transformative outcomes and sustainable growth.

Program & Process Redesign and Optimization

Re-imagine programs and processes using best practices in lean six sigma and human-centered design

Organizational Change Management

Engage stakeholders, communicate with clarity, and align the people of your organization with change efforts, including establishing Change & Transformation Offices or Communities of Practice, and creating organization-specific change frameworks and toolkits

Community Engagement and Co-Design

Bring together different stakeholders of diverse backgrounds and experiences to collaborate on joint efforts and shared goals

Strategy and Strategic Planning

Develop or enhance your organization's vision, mission, identity, audience and impact, and align operational plans with strategic intent

Team Building and Conflict Resolution

Forge strong relationships and work through unresolved trauma and conflict while engaging in creative, play-filled and outcomes-driven approaches

Our training & workshop offerings

Our Approach

We firmly believe in a hands-on, experiential training approach that emphasizes practical application and embodied learning rather than relying solely on presentations and information.

Strategic Storytelling

How to engage and influence using your stories

Executive Improvisation

Using improvisation to unleash creativity, agility, and transform our relationship with failure

Collaborative Conversation Design

Learn how to have and facilitate collaborative conversations

Future Thinking and Vision Casting

Intentionally and strategically design the future

Resiliency and Wellbeing

Gain practical strategies and tools to navigate challenges and foster a positive mindset for personal and professional success

Visual Thinking Strategies

Using art to observe and think together, helping move beyond stereotypic, fast thinking into deliberate, innovative meaning-making and perspective sharing

Our Overall Philosophy and Approach to Strategy

At DesignConvo, our approach to strategic planning is driven by a powerful blend of human-centered design principles and a clear strategic framework. We believe that meaningful transformation arises when strategy is rooted in empathy, collaboration, and a comprehensive understanding of both the immediate challenges and the long-term aspirations of our partners.

Human-Centered Design at the Heart of Strategy

Central to our philosophy is the principle of human-centered design. We recognize that the success of any strategic endeavor hinges on the people it serves. By placing the needs, desires, and experiences of stakeholders at the forefront of our process, we unlock insights that empower us to co-create solutions that truly resonate. Through deep engagement with community members, partners, and stakeholders, we gain invaluable perspectives that shape the trajectory of our strategic plans.

A Holistic Strategy Framework

Our philosophy aligns seamlessly with a strategic framework that guides our methodology. We believe that simple is powerful, and our integrated framework contains 5 components:

Mission, Vision & Values

The "heart" of the framework, the organization's identity and beliefs ground the strategy and form the foundation for future work.

Strategic Environment & Argument

Understand why this strategy is important and crafting a compelling case by analyzing data and market trends to support the strategic direction and objectives of the plan. Ultimately, the strategy seeks to answer, "Why is what we do, and the way we do it, important, and why now?"

Strategic Statement

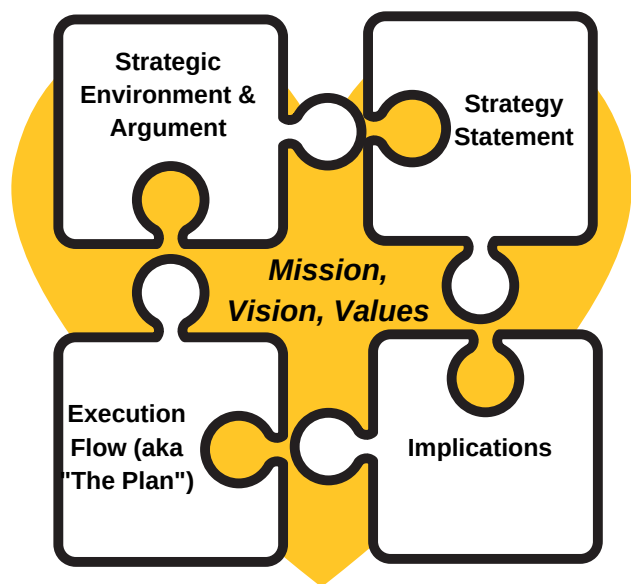
The core strategic direction is distilled into a concise and focused statement that outlines the organization's purpose, goals, and intended outcomes.

Implications

Evaluating the potential impacts, risks, and resource requirements associated with the chosen strategic direction, providing insights for informed decision-making.

Execution Flow, aka "the Plan"

Translate the strategic statement into a clear action plan, outlining the sequence of activities, responsibilities, and timelines.



Great strategy (or great anything really) emerges not from a SUPPRESSION of the emotions, but from BALANCING them with the thinking mind.

Thought + feeling = brilliance.

~ Alex M H Smith, Strategy expert

Our Overall Philosophy and Approach to Leadership Development

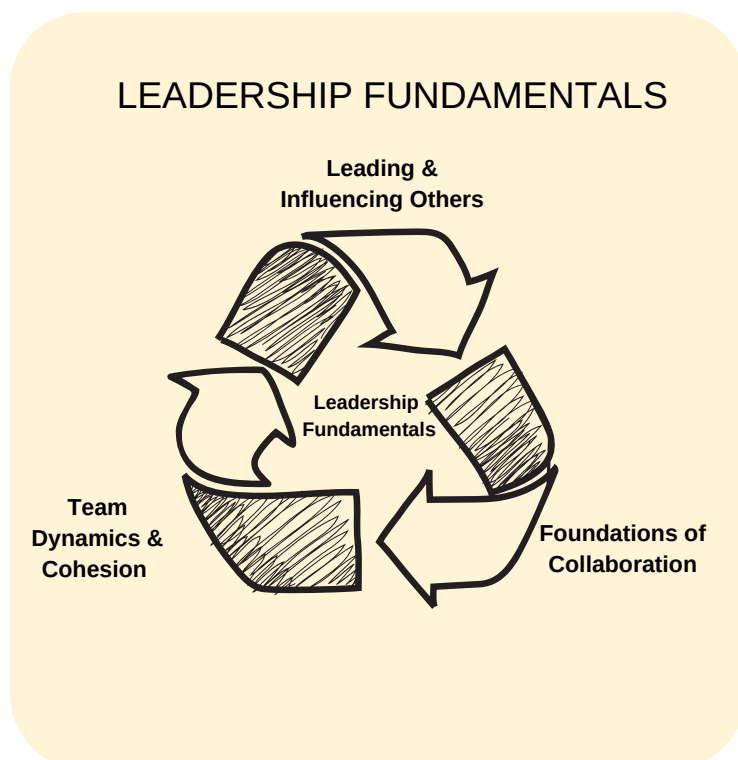
At DesignConvo, we believe that effective leadership development goes beyond traditional classroom-style lectures. Our philosophy for teaching is based in adult learning models, and centers on immersive, applied learning experiences that empower leaders to actively engage in their growth journey. We understand that true skill development comes through practice, application, and continuous reinforcement.

Our Approach for Executive Leadership Retreats and Convenings

We believe in co-design, and work collaboratively with clients to ensure we are crafting a retreat or convening that meets their needs. While we may be the experts in group process design, we never approach engagements with a "one size fits all" mentality. We will work closely with an organization to ensure we account for the unique needs of each group of leaders.

Our Leadership Fundamentals

Our unique approach is the result of extensive research and analysis. In 2021, DesignConvo conducted a comprehensive **survey of 100+ higher education leaders** to discover missing skills in leaders and identify areas where development was needed most. It was through this survey that the five primary pillars of leadership emerged: *Improvisation, Strategic Storytelling, Facilitation, Cultural Intelligence, and Visual Thinking Strategies*.



Leading & Influencing Others

Empowering leaders to leverage the power of strategic storytelling to authentically engage and influence others, drive effective communication, and get stakeholder buy-in.

Foundations of Collaboration

Equipping leaders with essential skills to effectively collaborate within a team while gaining a clear understanding of individual and collective roles.

Team Dynamics & Cohesion

Actively cultivating the intricacies of fostering strong teamwork, addressing interpersonal dynamics, and creating a cohesive environment to enhance overall performance and collaboration.

Qualifications and Similar Projects

In the past three years, DesignConvo has effectively provided services aligned with the scope outlined in this proposal to various large and complex public and private entities. Our major clients during this period have included:

Wellbeing Collaborative (May 2022-Ongoing): We engaged with the Wellbeing Collaborative, a non-profit alliance of the major health organizations across Arizona to develop a 3 year strategic planning focused on engaging a broad network of executive stakeholder to tackle the health provider wellbeing crisis. Our services started in May 2020 and are on-going as we are continuing to help provide leadership development workshops, stakeholders engagement, and strategic plan implementation services.

Northern Arizona University (April 2023): We collaborated with Northern Arizona University to conducted workshops focused on human-centered design strategic planning for an 25+ executive leaders. This engagement resulted in 5 unique strategic plans as well as enhanced leadership intelligence and adaptability. Our engagement focused on the design, delivery, and summary of a 2.5 day executive retreat.

Scottsdale Unified School District (January 2023-July 2023): We collaborated with the Scottsdale Unified School District, s district with 30 schools, 22,00 students, 3000 employees, and 100+ leaders, to design innovative strategies for prioritizing student and staff needs. This collaboration occurred started January 2023 and ended July 2023 leading to improved stakeholder engagement and support for educational journeys.

Arizona Innovation Alliance (May 2023-August 2023): We collaborated with the Arizona Innovation Alliance, an Alliance across the 3 major state universities in Arizona to design and lead a 1.5-day design retreat focused on bringing 50+ leaders together. Integrating improvisation, teaming, facilitation, and human-centered design techniques, we help this group of executive leaders to collaboratively effectively to tackle complex challenges and foster innovation.

Northern Arizona Regional Behavioral Health Alliance (March 2023): We collaborated with the Northern Arizona Regional Behavioral Alliance (NARBHA) a managed care entity that serves as a state-contracted Regional Behavioral Health Authority for the Apache, Coconino, Mohave, Navajo, Yavapai and Gila Counties in Arizona to delivering impactful and engaging human-centered facilitation and workshops to 35+ leaders. We worked with their executive team to tailored the workshops to meet their specific needs and objectives, and provided practical tools and strategies that were immediately applicable to their work.

Arizona State University (September 2023-ongoing)

Arizona State University is the largest public university in the United States with over 112, 000 undergraduate students, and 30,000 graduate students, 5000+ faculty members, and hundreds of leaders. Our engagement with ASU has spanned multiple teams, departments, and initiatives.

- **Advance Leadership Initiative:** Delivered a comprehensive leadership workshop centered on strategic storytelling, tailored for ASU Executive Leaders. The workshop aimed to enhance leadership communication and effectiveness.
- **Enterprise Technology** -Led a cohort of over 40 leaders in executive improvisation workshops, fostering creative, flexible, and empathetic leadership approaches that contributed to enhanced leadership agility and effectiveness.
- **DEI Design Workshop** -Developed and facilitated a half-day workshop for Diversity, Equity, and Inclusion (DEI) leaders across ASU, equipping them with tools and strategies to create inclusive environments.
- **Fulton Schools of Engineering Annual Advising Retreat:** Conducted a future-oriented workshop focused on vision casting for advising leaders across Fulton Schools, promoting collaborative vision development and strategic alignment.
- **Women in Fulton Leadership Consortium:** Facilitated a specialized leadership workshop on strategic storytelling for female engineering students within the Fulton Schools of Engineering. The workshop aimed to empower emerging leaders with communication skills.
- **College of Health Solutions:** Orchestrated a multi-month program redesign, leadership development, and strategic identity engagement initiative for the College of Health Solutions, driving positive transformation within the organization.

ANCA CASTILLO

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@anca-castillo

PROFILE

Masterful level conversation designer and facilitator with proven ability to identify/scale strategic solutions, design unique conversations cross all levels of an organization, and utilize storytelling and improvisation to allow stakeholders and organizations to drive change and craft the leaders of the future.

EDUCATION

Masters in Business Management

Arizona State University

2015

Bachelors of Science in Kinesiology

Arizona State University

2013

CERTIFICATIONS

Human Centered Design Facilitator

Luma Institute

2023

Designing Strategy

IDEO U, 2022

Human Centered Design Practitioner

Luma Institute, 2022

Strategic Storytelling Facilitator

The Storytelling Leader, 2022

Six Sigma Green Belt Certification

Arizona State

University, 2018

PROFESSIONAL QUALIFICATIONS

Master Facilitator | Conversation Designer | Human-Centered Design | Education Development Executive Storytelling | Public Speaking/Presenting | Strategic Planning/Development Executive Leadership Programming | Problem Solving

UNIQUE SKILLS

- Professional Dancer/Performer
- Bilingual: Fluent in English and Romanian
- Improviser with a local team in Arizona
- Speaker for multiple conferences and public engagements
- Graphic design for visual communication

EXPERIENCE

Founder & Master Facilitator

DesignConvo LLC | 2022-Current

- Created a proprietary framework for operational excellence and culture transformation.
- Facilitated 100+ strategy sessions for diverse organizations, solving complex challenges and crafting strategies.
- Designed strategic conversations for senior executives across for profit, non-profit, government, and education organizations
- Developed a professional certification course, training 400+ executives as facilitators
- Led design summits, fostering global collaboration on solving large-scale challenges
- Provided leadership training for 150+ executive leaders across all industries focused on storytelling, improvisation, facilitation, and strategic planning

Innovation & Design Fellow University Design Institute

Arizona State University | 2021-2022

- Facilitated design sessions for global leaders, fostering collaborative problem-solving and education program development.
- Collaborated with experts to reimagine institutions and drive systems-level change.
- Published a global survey of 100+ leaders, addressing their leadership challenges.
- Developed a unique leadership program for university presidents.
- Crafted strategies for multimillion-dollar funding opportunities.
- Led initiatives to develop and share UDI stories for internal and external stakeholders.
- Trained 150+ leaders in Southeast Asia in facilitation skills

Associate Director

Ira A. Fulton Schools of Engineering, Arizona State University | 2019-2021

- Increased recruitment/yield for 40+ programs by 150% through human-centered design.
- Managed budgets over \$2 million, provided updates to senior leadership.
- Developed a research program, increasing diversity partnerships with HBCUs and MSIs.
- Raised over \$350,000 through personal relationships with Intel, Facebook, and Texas Instruments.
- Launched an interactive website, increasing web engagement by 200,000%.

Assistant Director

W. P. Carey School of Business, Arizona State University | 2017-2019

- Supervised a team, innovating application and yield metrics for 6 graduate programs.
- Collaborated on initiatives to support college goals.
- Implemented a new structure to increase leadership openings.
- Utilized Six Sigma for data-driven efficiency projects.

Front Office Manager

Foothills Sports Medicine, Physical Therapy | 2013-2017

- Supervised a dynamic clinic with 20 employees and 400+ patients.
- Identified and mitigated a liability issue, lowering patient refunds.
- Restructured processes to increase operation efficiency.
- Created an employee incentive program, reducing turnover by 89%.

CARY LOPEZ, PHD

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@caryjslopez

PROFILE

Workforce transformation expert and dedicated practice-based researcher who brings her years of experience and passion for organizational studies together to engage with organizations to create human flourishing. Cary focuses on helping teams build trust, create hope for a better shared future, and leadership skills to advance their personal and organizational missions.

EDUCATION

Doctor of Philosophy in Human Communication

Arizona State University
2023

Masters in Communication

Arizona State University
2020

Bachelors of Science in Accounting

University of Colorado at Boulder
2003

CERTIFICATIONS

Certified Storytelling Leader

The Storytelling Leader
2022

Certified Change Management Professional

Association of Change Management Professionals, 2016

Project Management Professional

Project Management Institute, 2009

Certified ScrumMaster

Rally Software, 2010

Certified Public Accountant

State of Colorado, 2005

PROFESSIONAL QUALIFICATIONS AND SKILLS

Master Facilitator | Conversation Designer | Organizational Design | Organization Development | Organizational Change Management & Transformation | Human-Centered Design | Training & Development | Executive Storytelling | Public Speaking/Presenting | Strategic Planning/Development Executive Leadership Programming | Problem Solving

UNIQUE SKILLS

- Fluent in French & English, with proficiency in Gaelic and Spanish
- Visual artist and pianist
- Founder and board member of multiple associations

EXPERIENCE

Founder & Master Facilitator

DesignConvo LLC | 2022-Current

- Created a proprietary framework for operational excellence and culture transformation.
- Facilitated 100+ strategy sessions for diverse organizations, solving complex challenges and crafting strategies.
- Designed strategic conversations for senior executives across for profit, non-profit, government, and education organizations
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- Led design summits, fostering global collaboration on solving large-scale challenges
- Provided leadership training for 150+ executive leaders across all industries focused on storytelling, improvisation, facilitation, and strategic planning

Director of Strategic Initiatives at the University Design Institute

Arizona State University | 2019-2022

- Developed and ran the internal design portfolio, serving executive leaders at ASU with strategic planning, leadership development, program and process redesign, and organizational design and transformation efforts
- Designed and executed ASU's 2019 Innovation Day and 2020 Innovation Quarter efforts, in which thousands of students, staff and faculty participated in hack-a-thon and learning events to celebrate ASU's culture of innovation
- Co-designed, developed, and trained 500+ people in the ASU Spark Method™, a proprietary problem solving method designed to help teams rapidly ideate.

Chief People Officer

W. P. Carey School of Business at Arizona State University | 2017-2019

- Developed and executed the human resources strategy for the school, including hiring and retention efforts for the 400+ staff and faculty employees.
- Performed a listening tour and developed a "state of the people" report, utilizing qualitative and quantitative measures for data-based decision making for culture enrichment efforts
- Coordinated all employee engagement culture activities with rotating volunteer members

Director of Strategic Initiatives

W. P. Carey School of Business, Arizona State University | 2016-2017

Director of Special Initiatives & Special Assistant to the Provost

University of Utah | 2012-2016

Director of Product Design and Lead Project Manager

Strategic Solutions for Business, Denver, Colorado | 2009-2016

Transition Readiness Lead

Sun Microsystems / Oracle, Broomfield, Colorado | 2008-2009

Senior Consultant

Hitachi Consulting, Denver, Colorado | 2005-2008

Attestation & Assurance Staff Accountant

Ernst & Young, LLP, Denver, Colorado | 2003-2005