

Curriculum Vitae

Resume also available

Danielle Lord, Ph.D.

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Leadership and Learning & Development Professional

EDUCATION

Doctor of Philosophy: Organizational Management | Leadership Theory (October 2007)

Capella University. Minneapolis, MN

Emphasis in Organizational Leadership

Dissertation Title: *Perspectives in Socialization: an Exploration of Nursing Career Satisfaction*

Master of Arts: Organizational Management (May 2001)

University of Phoenix. Seattle, WA

Emphasis in Organizational Development

Capstone/practitioner project: Work culture and staff behavior related to specific leadership behavior in a not-for-profit organization.

Master in Business Administration – 36/48 credit hours, not conferred (1995-1997)

St. Thomas University, Minneapolis, MN

Bachelor of Arts: Political Science and History (December 1991)

Pacific Lutheran University. Tacoma, WA

SCHOLARSHIPS

Samantha Smith Scholar (1991). University of Riga. Riga, Latvia, USSR

PROFESSIONAL SUMMARY

I am not a trainer. I am an educator who uses strategic insight and organizational development practices along with my experience and education to create meaningful experiences that change behavior. Through relationships and graciousness, I have designed, implemented, and managed large-scale, enterprise-wide leadership and learning development programs in large complex organizations in unstable environments. Proven expertise in:

- New employee on-boarding & socialization
- Large-scale, structured training & development
- 360 degree leadership feedback
- Employee Engagement surveys
- Complex team assessment, building, & facilitation
- Blooms taxonomy & domain-based curriculum development
- Experienced with ADDIE & SAM models & Kirkpatrick evaluation models level four
- Knowledge of survey & research development principles
- Large-scale leadership development programs - development, implementation, & management
- CME accreditation and management
- Survey writing
- Mentoring, coaching, & consulting
- Strategic goals & policy alignment
- Organizational performance measures
- Individual Development Plans
- End-to-end process training assessments
- Familiarity with healthcare, banking, manufacturing operations, & hospitality
- Behavioral & experiential-based organizational learning models
- Leadership development & succession Planning
- Change management: cultural & process
- CMS & virtual learning platforms
- Qualitative Data analysis and evaluation

PROFESSIONAL EXPERIENCE

Published author of workforce development articles and books, and curricula development in 50 subjects. Development of leadership and education infrastructure for three organizations: a national healthcare corporation with 1000 employees operating in 15 states, and a regional health system with 65,000 employees operating in five states, the State of WA, and Port of Seattle.

Daphen Enterprise, LLC

Principal

2021- present

Holding company for three small businesses. Manage all operations and creative content including Archetype Learning Solutions, a learning and leadership development organization designed to meet the needs of all businesses.

DBA: Archetype Learning Solutions

Organizational Development Consulting, Executive Leadership Coaching, Executive team facilitation, and professional speaker. Helping small to mid-size businesses attract, train, and retain top talent. Developed and produced the following proprietary materials:

- Two Leadership Development series and curricula: *Begin from Within* and *Shared Leadership* with 360.
- *Organizational Assessment* that measures eight points of organizational effectiveness.
- New team member *Socialization* package to ensure cultural inculcation efficiency, increased organizational commitment, and decrease role stress.
- Executive retreat learning simulation: *The Everest Experience*. This session highlights the importance of leadership knowledge in the areas of human behavior that limits or drives strategic goals.
- Collaborated with multiple coaches to increase awareness in the areas of leadership and employee engagement and strengthen team member relationships.
- Learning evaluation methodology to level 4 evaluation

2023 projects include:

- Provided Socialization and Leadership Development for Iceberg Ads. This work resulted in improved processes through change management strategies and strong employee engagement with team member retention during a significant financial downturn.
- Complete Organizational Design for Adaptive Roofing. Identified bottlenecks, redundancies, and scaling issues allowing Adaptive Roofing to identify significant savings in operational redundancies within three months. Developed the contractor on-boarding, new team member recruiting and socialization, and provided consultation on the development of the safety program and training.
- Organizational Assessment and Change Management for Center Collision. In process work.
- Socialization package for Seyler Enterprise. On-going coaching for new team member recruitment and policies.

Brandman University

Faculty: adjunct and extended education

Lacey Campus

April 2008 – 2019

Instruct graduate students in the Organizational Leadership and MBA programs. Use the Socratic methodology to guide student learning in an environment that is experiential and highly adaptive.

- 2014 Faculty of the Year: Brandman University, School of Business and Professional Studies.
- School of Extended Education corporate leadership development series: faculty, mentor, designer.
- Lead faculty: Campus MBA Program

Port of Seattle

Leadership Development Program Manager

Seattle, WA

Nov 2017 – Jan 2022

Responsible for two strategic initiatives supporting the Port's employee engagement and culture change platform: Leadership Development and Innovation. Led and facilitated HR collaborative efforts including organizational initiatives focused on performance, change management, process improvement, conflict resolution, employee engagement, and culture change. Developed the overall Port-wide leadership strategy.

- Designed, developed, and managed an innovative Leadership Development Program: LINK Leadership. Program included level four evaluation, learner-manager engagement strategy, and *push* based learner engagement.
- Led the Port's innovation efforts, including quarterly and annual recognition events, web-based innovation resource guide, and an annual week-long innovation fair.
- Implemented a resiliency program for customer and public facing Port employees, reducing stress and anxiety through active-listening sessions and focused outcomes.

Department of Enterprise Services

Chief Learning Officer

WA State

2017

Led statewide learning and performance strategy for WA State employees to align with the Governor's Employer of Choice strategy, "Results Washington" goals, and enterprise-wide learning solutions. To better support statewide enterprise needs, integrated three separate teams into one, the Workplace Learning and Performance unit, and established Centers of Excellence (COE). Implemented statewide mentoring program. Responsible for \$3.5 million annual budget.

- Restructured the unit to enhance both operational and creative capacity, saving the agency \$100,000
- Implemented Phase Two of the statewide leadership development efforts— "Leading Teams" concept projected to increase revenue by \$1,400,000. Program awarded the Governor's 2017 Innovation Award.
- Restructured the Instructional Design and Development COE to expand and increase agency responsiveness and customer needs driven learning solutions.
- Developed pathways for state employees and tools for leaders to assist with individual development, including competency mapping, a learning journey, and a program model of blended learning.
- Implemented a structured quality assessment program to ensure curricula alignment with external vendors.
- Increased net revenue \$65,000 annually in the Learning Solutions COE by reducing reliance on vendors.

Providence Health System, Seattle, WA, 2005 - 2017

System Manager, Clinical Leadership Development – Providence System Office

2010 - 2017

Selected to work with Executive Leadership to design, develop, and manage a strategic initiative. Responsible for directing the development and implementation of clinical leadership development efforts to lead an enterprise of 65,000 employees during times of transformational change. This resulted in six consecutive learner cohorts consisting of ~180 high-potential physician leaders. Implemented consistent curricula design practices in partnership with organizational development partners creating additional regional relationships and coaching. Developed system-wide strategies for clinic leadership development which mitigated the financial risks of MACRA. This program was awarded the ability to assign 56 category 1 CME.

- Designed and delivered leadership and development programs as an enterprise-wide pipeline development strategy for new and emerging leaders, inter-professional-clinical leaders, designated high-potentials, ambulatory medical home dyad partnerships, and HR Strategic Partners.
- Established consistent curriculum design procedures and protocol, and train-the-trainer model.
- Collaborated with multiple organizational stakeholders which enhanced content matter.
- Designed instructional methods for entire program, which maximized learning, retention, and application for adult learners.
- Developed and implemented an enterprise-wide sabbatical based, strategic stretch assignment, enterprise-wide mentoring, and experiential based development assignments.
- Developed program curriculum and produced classroom, virtual, and JIT training.
- Facilitate 360 process, Individual Development Plans, and coaching using the 70/20/10 model.
- Measured and evaluated program and leadership development strategies at Kirkpatrick's level 4 evaluation, receiving positive after-action reviews.

- Managed new projects as necessary for further strategic development through vendor partnerships
- Prepared and presented board reports.

Director of Organizational Development – Providence Southwest Service Area 2007 - 2010

Led the transformational change from a hospital education department to a Service Area Organizational Development unit with responsibility for the organizational and leadership development for three ministries and 3000 employees. Increased employee engagement scores by 17% over a three-year period.

Director of Organizational Development

- Oversee the curriculum development of the quarterly Service Area Leadership Development Institute with responsibility for 400 Service Area leaders.
- Consulted and partnered with senior leadership to develop and implement Commitment to Excellence initiatives through cultural change and goal alignment.
- Assessed qualitative and quantitative survey data to recommend and implement effective organizational change practices.
- Consulted and collaborated with multi-disciplinary leaders to develop and shared initiative best-practices.
- Directed the Service Area annual employee engagement survey, planning, implementation, and meaningful action plans.
- Partnered with Nursing to develop and implement a hospital-wide mentoring program increasing first year retention by 9%.
- Developed of new manager orientation and leadership coaching, and employee succession planning.

Manager of Organizational Development and Education – Providence St. Peter Hospital 2006 - 2007

Managed the educational operations related to ongoing needs assessment, development and delivery, measurement, and compliance of organizational learning activities within a highly regulated environment. Partnered with a variety of organizational stakeholders to implement innovative training and process improvement.

Manager of Organizational Development and Education

Modified New Employee Orientation, resulting in operational efficiencies and overall cost reduction of \$24,800 annually.

- Revised the student clinical rotation process, which increased organizational efficiencies and compliance
- Implemented self-service conference services scheduling software and CMS platform
- Created and implemented a variety of school partnerships, which enhanced youth-outreach.

Change Management Lead and Training Coordinator – Providence WA/MT Regional Services 2005 - 2006

Proactively managed the organizational change of new business processes during a statewide system implementation in Washington State. HR, finance, and accounting changes impacted 10,000 employees in three hospitals, 13 ancillary healthcare provider sites, and the Washington Regional office.

- Responsible for the development and implementation of training and support needs from assessment, design, evaluation, and compliance for 10,000 employees in western Washington.
- Responsible for assessing change impact, conducting change readiness, and communicating new processes and business procedures as a result of regional changes.

The Council for Adult and Experiential Learning Seattle, WA (Regional Office)

Washington State Site Project Manager – One year federal contract position 2004

Project oversight and responsibility for Washington State's efforts to develop and implement a Healthcare Apprenticeship pilot project.

- Worked with multiple stakeholders throughout Washington State
- Creatively challenged existing paradigms and entrenched processes to bring about changes in educational delivery models resulting in unique solutions to a national problem.

- Partnered with stakeholders to create and implement efforts to increase organizational effectiveness and employee growth opportunities through on-going needs assessment for mentoring, training, and innovative curriculum needs of client partner workforce.

Tacoma Pierce County Employment and Training Consortium

Tacoma, WA

Regional Grant Administrator – Federal grant funded one year position

2003

Hired to develop, implement, and manage \$3 million federal Department of Labor grant to assess the training and mentoring needs of client partner workforce. Developed innovative educational opportunities for high-demand healthcare occupations in four counties.

- Implemented Pyxis systems in local colleges, which reduced student attrition by 33%
- Developed the first federally recognized HealthCare apprenticeship, achieving national and statewide recognition for two client partners from **WA State Governor Gary Locke** (Promising Practice Award, 2003) and **U.S. Senator Maria Cantwell** (Lifelong Learning Award, 2004)

Senior Services of America, LLC

Tacoma, WA

Director of Organizational Development and Training

2001- 2003

Responsible for directing the training and development operations for 15 assisted living facilities nationwide. Developed and managed training programs and standards for 1000+ nationwide employees including: training needs assessment and effectiveness, training delivery, material assessment, curriculum development, new staff orientation, and a staff recognition program.

- Assessed leadership and cultural needs throughout nationwide satellite facilities and directed organizational wide change management strategies.
- Additional responsibilities included corporate risk management and regulatory compliance oversight, corporate quality assurance programs, and project manager for two out-of-state capital improvement projects.
- Developed and published two caregiver training courses that were awarded WA State (DSHS) certification.
- Performed compliance due-diligence for potential national purchases.

Assisted Living Industry (Healthcare/Long Term Care/Hospitality)

Tacoma, WA

Executive Director/ Administrator

1998 - 2001

Served as Executive Director for three Assisted Living Communities. Successfully managed all operations including staff of 50 and 75; regulatory compliance; and all aspects of HR, as well as multi-million-dollar annual budgets.

- Increased employee retention using mentoring best practices and shared vision
- Served as an Alterra, Inc. corporate/district trainer assessing training needs, measuring overall effectiveness, and maintained all employee training certifications
- Implemented an organizational wide Shared Vision and employee engagement program resulting in a noticeable cultural change reducing employee turnover from 120% to 8% while significantly improving customer satisfaction within six months
- Developed and implemented staff mentoring program based on skills benchmarking and best practices for 75 employees
- Developed and published two caregiver training courses that were awarded WA State (DSHS) certification

Transition Networks, Inc.

Minneapolis, MN

Corporate Trainer, Quality Assurance, and Customer Service Supervisor

1992 - 1997

Responsible for the development of the organizational training infrastructure in a medical equipment manufacturing organization. Assessed both organizational need and effectiveness as measured by quality assurance and regulatory benchmarks.

- ISO 9001 change manager, trainer, and standard lead.
- Designed, developed, and implemented an organizational quality customer service program, and an organizational wide training for inter-related departmental activities, reducing customer service errors by 17% during the first year.
- Developed a customer support product brochure reducing technical support calls by 11%, and product returns by 3% within the first quarter.

Retail: Fredrick & Nelson, Nordstrom, Gottschalks

Tacoma, WA

Sales Associate and Asst. Dept. Manager

1987 - 1991

Assisted customers in a variety of retail settings. Responsibility for receiving merchandise, POS sales markdowns, store closing, and authorizing customer cash-outs.

PROFESSIONAL CERTIFICATIONS

2013 Conflict Dynamics - Certified

2012 Personalisis - Certified

2009 Select Interviewing - Certified

2008 Development Dimensions International - Certified

2007 Lominger Development Tools - Certified

2007 William Bridges Transitions - Certified

2003 Myers Briggs Type Indicator - Certified

PROFESSIONAL PRESENTATIONS

2023 – The Mosley Method Podcast: *When do you let leaders fail?*

2023 Altrusa Int'l Spring Conference. *Leading in a new era: Creating a culture where everyone thrives.*

2023 Lets Break -up podcast: Toxic workplace stories. *The role of leadership*

2022 – Kiwanis International, Gig Harbor *Mindset Matters.*

2016 - 2020 Brandman University School of Extended Education – corporate leadership Development Series (Harborstone and TwinStar Credit Unions). *Crucial Conversations, Managing Change and Transitions, Authentic Listening, and Mentoring.* Function as program lead and learning coordinator.

January 2017 Oberto! *Downtime Code Changes* training and change management

June 2016 – TwinStar Credit Union. *DiSC debrief and team building*

Q3 – 4 2015 – Brandan University School of Extended Education – corporate leadership development Series (Bio-Rad). *DiSC, Emotional Intelligence, and Crucial Conversations*

August 2015 WA State Office of Public Instruction. *MBTI: Emotional Intelligence and team building.*

July 2014 WA State Department of Licensing. *MBTI Team development, team work, and conflict resolution.*

March 2013 and 2014 Physician management group leadership development. *Priority setting through team development and Making meetings work.*

September 2013 Sumner Downtown Association Board of Directors. *Emotional Intelligence.*

August 2013 American College of Nurses. *Emotional Intelligence.*

August 2011 Business Week! *Emotional Intelligence: the foundation of leadership*

August 2007 New Market Skills Center. *Effective Communication in the Work Place*

April, June, & August 2007 New Market Skills Center. *Communication and Team Building*

June 2005 WAHSA 54th Annual Conference. *Creating a Learning Organization*

April 2005 Snohomish County Workforce Development Council Nursing Conference. *Using Type to Find the Ideal Nursing Career*

November 2004 Washington Health Occupations Educators Association. *The Use of Apprenticeship for Establishing HealthCare Career Ladders*

Presentations continued:

July & October 2004 Department of Labor and Industries. Panel Member: *Apprenticeships in HealthCare*

April 2004 Council for Nurse Educators in Washington State. *Apprenticeships in HealthCare*

April and November 2004 Get Electrified! Pierce County WDC. *Communication and Team Building*

December 2003 Pierce County WDC, Tacoma, WA. *Communication and Team Building*.

April 2003 City of Milton. *Understanding Dementia*

August 2001 Broadmore Assisted Living. *Dementia Training*

PROFESSIONAL ASSOCIATIONS

Pacific NW Organizational Development Network

American Society of Training and Development

PROFESSIONAL/ORGANIZATIONAL CURRICULA DEVELOPMENT

- 10-day Employee Engagement Challenge
- 360 debriefs and employee development planning for leaders
- Abuse reporting in boarding homes (received WA State Certification, 1999)
- Action Learning methodologies and projects
- Begin from Within series: foundations of leadership
- Change through transformational leadership
- Conflict competent leadership (in person and webinar format)
- Conflict in the workplace
- Critical reflection for leaders
- Customer Service
- Downtime codes
- Emotional Intelligence: the foundation of leadership
- Employee Development: Using development tools for maximum growth
- The Everest Experience: Leading teams through chance and conflict to collaboration
- Experiential learning activity: Employee Engagement
- Experiential learning activity: Innovation and leadership
- Fall prevention for the elderly population (WA State Certification, 1999)
- Human relations and communication
- Improving communication and team building through type
- Leadership in healthcare
- Leadership: principles and practices (in person and webinar format)
- Leading across the organization: Senge Synthesis
- Leading change: leading through watershed events (in person and webinar format)
- Leading clinic operations: an experiential journey in the life of a clinic
- Leading individuals: engagement, expectations, and coaching
- Leading teams through change and conflict: a trip up Mt. Everest
- Learning organizations: fostering learning through leadership
- Making sense of Team Dynamics and the FAST tools
- Managing and leading staff: a guide for nurses
- Managing Organizational Transitions (in person and webinar format)

Curricula development continued:

- Marketing for assisted living
- Mentor training
- Medication assistance for non-practitioners – Boarding Home Applications (received WA State Certification, 2000)
- Organizational behavior
- Servant Leadership
- Situational Leadership
- Staff Motivation: understanding motivational Factors and human development
- The Science and Archetype of *Presence*
- Train-the-trainer
- Understanding dementia (received WA State Certification, 2001)
- Understanding residents, families, and peers through generational values
- Understanding self and others: a guide to leadership self-awareness
- Understanding team dynamics (in person and webinar format)
- Using Type to find the ideal nursing occupation
- Workforce development through apprenticeship
- Workplace values: understanding generational differences

ACADEMIC/FACULTY EXPERIENCE

2008 – 2019: Adjunct Faculty, Brandman University (part of the Chapman University system), Lacey Campus. Graduate and undergraduate courses taught:

- OLCU 303 – Organizational Development and Change Management
- OLCU 400 – Foundations of Leadership Theory
- OLCU 425 – Organizational Diversity and Leadership
- OLCU 460 – Organizational Leadership
- OLCU 486/487 – Analytical Thinking and Undergraduate Capstone
- OLCU 600 – Leadership Theory
- OLCU 602 – Self, Systems, and Leadership
- OLCU 607 – Leading Teams
- OLCU 613 – Seminar in Organizational Behavior
- OLCU 614 – Teams and Leadership
- OLCU 615 – Organizational Development and Change Management
- OLCU 617 – Organizational Development Practitioner
- HRCU 646 – Training and Development
- OLCU/HRCU/MHAA 632 – Innovation and Leadership
- OLCU/HRCU/MHAA 680 – Organizational Research
- OLCU/HRCU 681 – Graduate Leadership Capstone
- OLCU/MBA 682 – MBA Capstone

RESEARCH & PUBLICATIONS

Bronson, P., & Jackson, D. (2002). Medication Assistance for Non-Licensed Staff. Tacoma, WA. Assisted Living Solutions.

Jackson, D., & Soper, P. (2008, Jan). Establishing a Mentoring Program. *The Staff Educator*, hcPro. Marblehead, MA.

Publications continued:

- Jackson, D. (2007). Perspectives on Socialization: An Exploration of Nursing Career Satisfaction. Unpublished Doctoral Dissertation: UMI.
- Jackson, D. (2004) Mentoring HealthCare Staff. Chicago, IL. CAEL.
- Jackson, D. (2003). Hiring and Retaining Staff. *Assisted Living Success* 8(6): 22-23.
- Jackson, D. (2001). Understanding Dementia and Resulting Behavior. Tacoma, WA. Senior Services of America.
- Lord, D. (2023) *Authority Magazine*. New York, NY. June 2023
<https://medium.com/authority-magazine/dr-danielle-lord-of-archetype-learning-solutions-5-essential-elements-for-creating-a-successful-3da65b41c28>
- Lord, D. (2023). *Authority Magazine*. New York, NY. March 2023
<https://medium.com/authority-magazine/from-frenzy-to-focus-danielle-lord-of-archetype-learning-solutions-on-how-we-can-cancel-hustle-caebd6ccb48>
- Lord, D. (2023). Focused Moments: Creating shared experiences and positive team dynamics in leadership. Joy House Publishing. Federal Way, WA.
- Lord, D., & Schecter, L. (2015). Physician-Clinician to physician-leader: Understanding the development needs and practices of aspiring physician leaders. Self-published.

OTHER EXPERIENCE (Community and Volunteer)

- 2023 - Bonney Lake Chamber Collective: Board Member
- 2014 – Sumner Downtown Association: Board Member
- 2012 – 2013 Auburn Riverside High School Senior Night Coordinator & Committee Chair
- 2009 – 2010 St. Martin’s University Board Committee: Marketing and Branding
- 2006 – 2007 50 Lanterns: Board Member
- 2000 – 2002 Domestic Abuse Women’s Network (DAWN): Board Member
- 2001 -- Miss Washington Platform Advisor (Platform topics: Aging, Geriatrics, and Long Term Care)
- 1989 – 1991 YMCA Youth and Government Program Advisor

AWARDS & ACCOLADES:

- 2020 -- Port of Seattle – Outstanding Women’s Achievement Award
- 2017 – DES, Governors Innovation Award – Leading Teams Leadership Development
- 2014 – Brandman University, Outstanding Faculty Award
- 2004 – CAEL, Senator Maria Cantwell Lifelong Learning Award – first federally recognized healthcare apprenticeship
- 2003 – TPC WSD, Governor Gary Lock Promising Practice Award - first federally recognized healthcare apprenticeship
- 2002 – Sr. Services of America, WA State - recognition of first DSHS certified Caregiver Training