

**WRITTEN RESPONSE SCORING**  
**November 21-November 29**  
**RFX #2334-835**  
**Business Consulting and Strategic Planning**

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**Vendor Name: Liberum**

**Evaluator Number: WE1**

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score based on the criteria only.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- We would prefer that you leave a comment for each question scored, briefly explaining why you assigned that particular score.
- You may discuss the proposals among the evaluation team, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something that was not asked for in the Solicitation.

Scoring of Proposals

The following available points will be assigned to the proposal for evaluation purposes:

Section 5

254 points

If you have questions, please direct them to Cindy J Carroll, Solicitation Coordinator, phone 360-664-5573. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Score	Description	Discussion
90-100% of available points	Exceptional	Clearly superior to that which is average.
70-80%	Above Average	Better than that which is average.
50-60%	Average	Baseline score for each item with adjustments based upon the evaluator's interpretation of the Bidder's response.
30-40%	Below Average	Substandard to that which is average.
10-20%	Failing	Non-responsive or clearly inadequate to that which is average.
0%	No Experience	Response shows no experience in this skill or capability.

**Evaluator Scoresheet for RFX #2334-835**

You will be evaluating one part of the bidder’s submission: Section 5, Bidder Qualifications and Experience. If a question requires Bidders to submit additional documents, they will be included in an attached document.

2.	BIDDER 350 Points		MAX POINTS	SCORE
	A	Describe the experiences, skills and qualifications your team possesses that are relevant to: Strategic planning, including work with MVVs, goals, objectives, action plans, and key performance indicators.	50	42
COMMENT:	<p>Answer:</p> <p>Liberum has assembled a team of expert-level consultants to support DDS with all aspects of this engagement. Specific to strategic planning, we’re offering over 13 years of cumulative experience, coupled with over 28 years of experience working with DSHS. We believe the combination of acumen in strategic planning and the understanding of the DSHS culture and organizational norms provides DDS with a holistic approach to building a comprehensive and sustainable strategic plan and associated deliverables. Our strategic planning work with DDS will be led by Carli Easter, a seasoned strategic planning expert who has the following DSHS-specific strategic planning experience: DSHS: Aging and Long-Term support Administration 2022-2023; DSHS: Office of the Secretary 2017-2022; DSHS: ESA, Division of Child Support: 2015 to 2017. Carli led the facilitation of the 2019-2021, 2021-2023 and 2023-2025 DSHS Strategic Plan (<a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a>), and joined Liberum in January 2023 as a consultant. Carli is well-versed and effective in facilitating full strategic planning, from identifying mission, vision, and values for an organization, to building the strategic plan, including goals and objectives, and creating actions plans and key performance indicators for implementation and measurement of progress. Her aim is to help DDS outline and effectively roll out their strategic plan, with an eye on how it fits into the larger DSHS context for alignment and sustainability. Carli will be joined by Jessica Armstrong, a Senior Consultant with Liberum who has over 3 years of experience leading strategic planning efforts. As DSHS’s former Strategic Project Administrator, she managed and administered project portfolio best practices, facilitating teams to identify key performance indicators and action plans to support their strategic plans. Carli and Jessica will be supported by Samantha Trotter, Liberum’s OD Practice Director and expert facilitator. Most recently (August 2023), Samantha, Jessica, and Carli partnered to facilitate DSHS’ Division of Vocational Rehabilitation Leadership Team with strategic visioning. The three day workshop culminated in a new vision statement for DVR, which was introduced to staff for feedback and discussion, and ultimately adopted and celebrated at DVR’s 2023 in-service.</p>			

B	Describe the experiences, skills and qualifications your team possesses that are relevant to: Leadership training and development from executive management level to front line supervisors.		
COMMENT:	<p><b>Answer:</b></p> <p>In all engagements, our Liberum practitioners are developing leaders, from front-line supervisors to middle managers and up to executive level. Our DDS consultant team provides the following Leadership Development expertise: Samantha Trotter has over 17 years of experience developing and delivering training for adult learners and specializes in leadership development and executive coaching. Samantha is adept at building curriculum that address learners’ needs, with engaging and useful sessions that build skill and foster positive and repeatable leader behaviors. Samantha created and implemented Supervisor Forums as DOL’s Employee Development Manager, offering monthly classes on performance management, employee engagement, and other leader concepts and competencies. Samantha is joined by Jessica Armstrong, with 16+ years of training experience and DSHS’ former Performance Transformation Manager, who led the implementation and delivery of the DSHS Performance Transformation training program that focused on leadership and OD for all DSHS managers and supervisors across WA State. Jessica’s role included executive coaching, mentoring, and consulting to support leader education. Megan Renaldo partners with Samantha and Jessica to support DDS, and brings over six years of leadership development experience. Megan served as the City of Boise Training and OD Coordinator 2018-2021, developing and delivering leadership curriculum across the organization. She’s currently an Adjunct Instructor at Boise State University, using theories of leadership and behavioral psychology, to teach students how to motivate and develop others, manage conflict, and lead teams and individuals to reach their goals. Megan also has prior experience as an HR Business Partner, designing and facilitating ongoing training and coaching for business leaders on topics including team development, performance management, and succession planning.</p> <p>In all engagements, Liberum places an emphasis on supporting leaders at all levels within an organization to fulfill their leadership role effectively. We create leader-specific trainings at the executive, middle-manager, and supervisor levels to support development of leadership competencies such as communication, coaching, prioritization, creating and aligning teams to a vision, and leading through change. We also implement leadership coaching, both in 1:1 (consultant to leader) and cohort (consultant with peer groups) models. Our practitioners are well-versed in supporting leaders to build self-awareness, identify goals, and develop and follow plans for building new skills, behaviors, and competencies.</p>	50	42
C	Describe the experiences, skills and qualifications your organization possesses that are relevant to: Business consulting services to include recommendations on best practices, decision-making models, and mediation through sticking points in the process.	50	40

	COMMENT:	<p>ANSWER:</p> <p>Liberum approaches all engagements through a lens of “leaving an organization better than we found them” by building organizational and leadership competencies. Our practitioners are well-versed in best practices in organizational development and use engagements with the client to guide and develop skill building in critical thinking, decision-making, and conflict resolution. The Liberum practitioners identified to support DDS include: Samantha Trotter, with over 20 years of supporting leaders and teams to efficiently and effectively prioritize and manage workload. Samantha is a certified Marchall Goldsmith Stakeholder-Centered coach and supports leaders to identify and address team dynamics issues, providing custom executive coaching and resources to support sustained behavior change. Samantha is joined by Rebecca Jarvis, who brings over 10 years of successful mediation experience in project, program, and operational settings. As Liberum’s Project Management Practice Director, Rebecca has over 15 years leading large-scale implementations and infrastructure projects with diverse teams. Her ability to quickly assess and effectively address conflict between individuals fosters healthy environments and builds conflict resolution skills for all involved. Rebecca also effectively builds decision-making competency via introduction of simple and effective models for organizing, prioritization, and implementation of action items. All of our practitioners on this effort have a passion for their work and approach engagements with robust experience and understanding of best practices in application. DDS can expect to learn, via observation and hands-on practice, how to effectively approach, organize, prioritize, and manage the work and people-side of this effort. Our team is committed to partnering with DDS to build competency so that this and future engagements are well-run, well-communicated, and effect sustained positive change.</p>		
D	<p>Provide the names of the key team members you will assign to this Contract, if you are the Successful Bidder, and provide their proposed roles and copies of resumes describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.</p>			
	COMMENT:	<p>ANSWER:</p> <p>Liberum has assembled a team of five of our practitioners with skills and experience perfectly aligned to the needs of DDS. Samantha Trotter, Organizational Development Director: will be the primary contact for DDS and is responsible for managing the practitioners contributing to this effort and contributing to all activities, with an emphasis on strategy, communications, leadership development, mediation, and executive coaching. Jessica Armstrong: will support all activities on the engagement, with an emphasis on Leadership Development. Carli Easter: will serve as the lead on Strategic Planning</p>	35	25

		for this effort. Megan Renaldo: will support Leadership Development on this engagement. Rebecca Jarvis: is an expert mediator and will support, train, and coach DDS leaders to resolve conflict. Rebecca is also well-versed in decision-making models and work prioritization and best practices, and will support DDS to organize and manage priorities effectively.		
E		Provide one or more sample training agendas and/or materials from a previous contract.	50	30
	COMMENT:	Answer Submitted with this response are examples of previous, similar efforts for DSHS Divisions. 1. Leading Through Change PPT from a Region 1 Leadership Team presentation at DVR in 2022. 2. Executive, Manager/Supervisor, and Employee Toolkits created for DVR in 2021. 3. The Fundamentals of OCM PPT created for DVR in 2023. 4. Effective Communication PPT from Liberum’s July 2022 OCM Help Lab (a series of free workshops provided to the community on all things Leadership, OCM, and OD). Examples from other agencies available upon request.		
F		Please provide feedback on the proposed timeline and training schedule with any recommended adjustments to timing, content, and sequence of events.	45	35
	COMMENT: Love that you recommend executive coaching through all. Your coaching focus and experience with DSHS is very good. We are not a typical DSHS agency however we	ANSWER: The Liberum team reviewed the proposed timeline and training schedule and offers the following feedback: 1. First and foremost, it is refreshing to have a client so engaged in and aware of current constraints, needs, and goals for their leaders and teams – we appreciate the thoughtful approach to this schedule and like the structure and suggested sequence of events. 2. With any engagement, we want to make sure to build rapport and familiarity with the organization and to understand the landscape of organizational structure, culture, and personalities therein. We propose doing short meet-and-greet sessions across the organization with a representative sample of staff in the first 1-1.5 months of the engagement. These sessions – typically 1:1 between a staff person and one of our consultants, would help us understand the full picture of DDS, and build positive relationships with employees. From there, our trainings, coaching, and support can be better tailored to suit the needs of DDS. The addition of these meet-and-greets would not displace or delay other activities on the schedule, but would be run in parallel. 3. Strategic Planning, Leadership Development, and intentional focus on the culture of leadership at DDS would benefit from executive coaching. Liberum typically threads executive coaching throughout all engagements, for the full duration, to support leaders in the organization to actively work on building competencies needed to support sustained change. We recommend adding executive coaching for the leadership team (and other leaders where appropriate/needed) across the timeline. 4. Finally, we recommend adding a lessons-learned or		

	are not because we are the “child” of SSA.	retrospective for the leadership team at the end of the schedule. This DDS undertaking reflects an intentional effort to make change, develop leaders, and build strategy for the organization, and gathering participant feedback on what went well and what could be improved helps to inform future efforts. Lessons-learned events also support an effective transition and sustainable practices as the Liberum consultant team prepares to wrap-up and depart DDS.		
G	Please provide a sample strategic plan or similar that has been developed within the past 24 months.			
	COMMENT: This was a great work example. The open resources and contact invitation at the end is really excellent. Well done.	Answer: Carli Easter, who leads Strategic Planning for this opportunity, facilitated the creation of DSHS’ 2023-2025 Strategic Plan (as well as the Strategic Plans for cycles 19-21 and 21-23). The Strategic Plan Guide for 23-25 and associated artifacts from that effort may be viewed here: <a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a> . Also submitted with this response, please find 1. Strategic Visioning and Action Planning Workshop PPT deck, which Samantha, Jessica, and Carli created for a 3-day workshop with DSHS DVR Leadership Team in August, 2023, and 2. The Strategic Visioning Storybook which Jessica created to communicate DVR’s new vision statement to staff and partners.	30	20
H	Provide a general budget narrative below that describes in detail how the budget will be associated with benchmarks and deliverables referenced in Section A(7) of the solicitation document.			
	COMMENT:	Answer: Liberum is supporting DDS with a team of five practitioners whose expertise aligns with agency needs and desired outcomes, and will staff this engagement with two expert-level practitioners across the entire 12 months (Samantha and Jessica) pulling in subject matter experts for Strategic Planning, Leadership Development, and Mediation (Carli, Megan, and Rebecca) as required based on activities outlined in the schedule. Upon review of the proposed timeline and schedule of activities, we’re aligning our hourly consultant allocation by month, and distributing hours evenly, which offers consistent and predictable costs for DDS. We anticipate a steady level of effort and engagement across the span of this work, and are focused on delivering highest level of service for the client while keeping costs consistent. DDS can anticipate monthly invoices of \$16,500, with hours broken down by consultant. The primary deliverables noted in Section A(7) of the solicitation document will be tracked for completion by Liberum and approved by DDS-identified representative(s). The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities,	20	10

		engagements, and deliverables are progressing according to schedule. We consider our engagement with DDS to be a success if we meet all deliverables, as approved by DDS, on the agreed-upon schedule and within budget scope.		
I		<p>Please provide a projected invoicing schedule that considers check-ins for validation of progress with costs broken down between the following Federal Fiscal Years (FFYs):</p> <p>(1) FFY 2024 – January 1, 2024 through September 20, 2024</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024</p>	20	10
	COMMENT:	<p>Answer:</p> <p>As noted above, Liberum is aligning consultant hours (and therefore costs to DDS) consistently across all 12 months of this engagement. Broken down by Federal Fiscal Years, totals are as follows:</p> <p>(1) FFY 2024 – January 1, 2024 through September 2024: 9 months @ \$16,500/month = \$148,500</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024: 3 months @ \$16,500/month = \$49,500</p> <p>The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule.</p>		



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**November 21-November 29**  
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**Business Consulting and Strategic Planning**

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**Vendor Name: Liberum**

**Evaluator Number: WE2**

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Scoring of Proposals

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Section 5	350 points
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<b>Score</b>	<b>Description</b>	<b>Discussion</b>
90-100% of available points	Exceptional	Clearly superior to that which is average.
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**Evaluator Scoresheet for RFX #2334-835**

You will be evaluating one part of the bidder’s submission: Section 5, Bidder Qualifications and Experience. If a question requires Bidders to submit additional documents, they will be included in an attached document.

2.	BIDDER 350 Points		350 MAX POINTS	SCORE
A	Describe the experiences, skills and qualifications your team possesses that are relevant to: Strategic planning, including work with MVVs, goals, objectives, action plans, and key performance indicators.			
	COMMENT: Excellent info directly tied to previous work with DSHS and other parts of the state.	<p>Answer:</p> <p>Liberum has assembled a team of expert-level consultants to support DDS with all aspects of this engagement. Specific to strategic planning, we’re offering over 13 years of cumulative experience, coupled with over 28 years of experience working with DSHS. We believe the combination of acumen in strategic planning and the understanding of the DSHS culture and organizational norms provides DDS with a holistic approach to building a comprehensive and sustainable strategic plan and associated deliverables. Our strategic planning work with DDS will be led by Carli Easter, a seasoned strategic planning expert who has the following DSHS-specific strategic planning experience: DSHS: Aging and Long-Term support Administration 2022-2023; DSHS: Office of the Secretary 2017-2022; DSHS: ESA, Division of Child Support: 2015 to 2017. Carli led the facilitation of the 2019-2021, 2021-2023 and 2023-2025 DSHS Strategic Plan (<a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a>), and joined Liberum in January 2023 as a consultant. Carli is well-versed and effective in facilitating full strategic planning, from identifying mission, vision, and values for an organization, to building the strategic plan, including goals and objectives, and creating actions plans and key performance indicators for implementation and measurement of progress. Her aim is to help DDS outline and effectively roll out their strategic plan, with an eye on how it fits into the larger DSHS context for alignment and sustainability. Carli will be joined by Jessica Armstrong, a Senior Consultant with Liberum who has over 3 years of experience leading strategic planning efforts. As DSHS’s former Strategic Project Administrator, she managed and administered project portfolio best practices, facilitating teams to identify key performance indicators and action plans to support their strategic plans. Carli and Jessica will be supported by Samantha Trotter, Liberum’s OD Practice Director and expert facilitator. Most recently (August 2023), Samantha, Jessica, and Carli partnered to facilitate DSHS’ Division of Vocational Rehabilitation Leadership Team with strategic visioning. The three day workshop culminated in a new vision statement for DVR, which was introduced to staff for feedback and discussion, and ultimately adopted and celebrated at DVR’s 2023 in-service.</p>	50	50

B	Describe the experiences, skills and qualifications your team possesses that are relevant to: Leadership training and development from executive management level to front line supervisors.		
	<p>COMMENT: Great experience in leadership training detailed.</p> <p>Answer: In all engagements, our Liberum practitioners are developing leaders, from front-line supervisors to middle managers and up to executive level. Our DDS consultant team provides the following Leadership Development expertise: Samantha Trotter has over 17 years of experience developing and delivering training for adult learners and specializes in leadership development and executive coaching. Samantha is adept at building curriculum that address learners’ needs, with engaging and useful sessions that build skill and foster positive and repeatable leader behaviors. Samantha created and implemented Supervisor Forums as DOL’s Employee Development Manager, offering monthly classes on performance management, employee engagement, and other leader concepts and competencies. Samantha is joined by Jessica Armstrong, with 16+ years of training experience and DSHS’ former Performance Transformation Manager, who led the implementation and delivery of the DSHS Performance Transformation training program that focused on leadership and OD for all DSHS managers and supervisors across WA State. Jessica’s role included executive coaching, mentoring, and consulting to support leader education. Megan Renaldo partners with Samantha and Jessica to support DDS, and brings over six years of leadership development experience. Megan served as the City of Boise Training and OD Coordinator 2018-2021, developing and delivering leadership curriculum across the organization. She’s currently an Adjunct Instructor at Boise State University, using theories of leadership and behavioral psychology, to teach students how to motivate and develop others, manage conflict, and lead teams and individuals to reach their goals. Megan also has prior experience as an HR Business Partner, designing and facilitating ongoing training and coaching for business leaders on topics including team development, performance management, and succession planning.</p> <p>In all engagements, Liberum places an emphasis on supporting leaders at all levels within an organization to fulfill their leadership role effectively. We create leader-specific trainings at the executive, middle-manager, and supervisor levels to support development of leadership competencies such as communication, coaching, prioritization, creating and aligning teams to a vision, and leading through change. We also implement leadership coaching, both in 1:1 (consultant to leader) and cohort (consultant with peer groups) models. Our practitioners are well-versed in supporting leaders to build self-awareness, identify goals, and develop and follow plans for building new skills, behaviors, and competencies.</p>	50	50
C	Describe the experiences, skills and qualifications your organization possesses that are relevant to: Business consulting services to include recommendations on best practices, decision-making models, and mediation through sticking points in the process.	50	50

	<p>COMMENT: Good response, hit all the key points and backed with experience.</p>	<p>ANSWER: Liberum approaches all engagements through a lens of “leaving an organization better than we found them” by building organizational and leadership competencies. Our practitioners are well-versed in best practices in organizational development and use engagements with the client to guide and develop skill building in critical thinking, decision-making, and conflict resolution. The Liberum practitioners identified to support DDS include: Samantha Trotter, with over 20 years of supporting leaders and teams to efficiently and effectively prioritize and manage workload. Samantha is a certified Marshall Goldsmith Stakeholder-Centered coach and supports leaders to identify and address team dynamics issues, providing custom executive coaching and resources to support sustained behavior change. Samantha is joined by Rebecca Jarvis, who brings over 10 years of successful mediation experience in project, program, and operational settings. As Liberum’s Project Management Practice Director, Rebecca has over 15 years leading large-scale implementations and infrastructure projects with diverse teams. Her ability to quickly assess and effectively address conflict between individuals fosters healthy environments and builds conflict resolution skills for all involved. Rebecca also effectively builds decision-making competency via introduction of simple and effective models for organizing, prioritization, and implementation of action items. All of our practitioners on this effort have a passion for their work and approach engagements with robust experience and understanding of best practices in application. DDS can expect to learn, via observation and hands-on practice, how to effectively approach, organize, prioritize, and manage the work and people-side of this effort. Our team is committed to partnering with DDS to build competency so that this and future engagements are well-run, well-communicated, and effect sustained positive change.</p>		
D	<p>Provide the names of the key team members you will assign to this Contract, if you are the Successful Bidder, and provide their proposed roles and copies of resumes describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.</p>			
	<p>COMMENT: Good break out of roles, and full resumes for all where provided</p>	<p>ANSWER: Liberum has assembled a team of five of our practitioners with skills and experience perfectly aligned to the needs of DDS. Samantha Trotter, Organizational Development Director: will be the primary contact for DDS and is responsible for managing the practitioners contributing to this effort and contributing to all activities, with an emphasis on strategy, communications, leadership development, mediation, and executive coaching. Jessica Armstrong: will support all activities on the engagement, with an emphasis on Leadership Development. Carli Easter: will serve as the lead on Strategic Planning</p>	35	35

		for this effort. Megan Renaldo: will support Leadership Development on this engagement. Rebecca Jarvis: is an expert mediator and will support, train, and coach DDS leaders to resolve conflict. Rebecca is also well-versed in decision-making models and work prioritization and best practices, and will support DDS to organize and manage priorities effectively.		
E	Provide one or more sample training agendas and/or materials from a previous contract.			
	COMMENT: Excellent materials provided.	Answer Submitted with this response are examples of previous, similar efforts for DSHS Divisions. 1. Leading Through Change PPT from a Region 1 Leadership Team presentation at DVR in 2022. 2. Executive, Manager/Supervisor, and Employee Toolkits created for DVR in 2021. 3. The Fundamentals of OCM PPT created for DVR in 2023. 4. Effective Communication PPT from Liberum’s July 2022 OCM Help Lab (a series of free workshops provided to the community on all things Leadership, OCM, and OD). Examples from other agencies available upon request.	50	50
F	Please provide feedback on the proposed timeline and training schedule with any recommended adjustments to timing, content, and sequence of events.			
	COMMENT: Good analysis with thoughtful recommendations.	ANSWER: The Liberum team reviewed the proposed timeline and training schedule and offers the following feedback: 1. First and foremost, it is refreshing to have a client so engaged in and aware of current constraints, needs, and goals for their leaders and teams – we appreciate the thoughtful approach to this schedule and like the structure and suggested sequence of events. 2. With any engagement, we want to make sure to build rapport and familiarity with the organization and to understand the landscape of organizational structure, culture, and personalities therein. We propose doing short meet-and-greet sessions across the organization with a representative sample of staff in the first 1-1.5 months of the engagement. These sessions – typically 1:1 between a staff person and one of our consultants, would help us understand the full picture of DDS, and build positive relationships with employees. From there, our trainings, coaching, and support can be better tailored to suit the needs of DDS. The addition of these meet-and-greets would not displace or delay other activities on the schedule, but would be run in parallel. 3. Strategic Planning, Leadership Development, and intentional focus on the culture of leadership at DDS would benefit from executive coaching. Liberum typically threads executive coaching throughout all engagements, for the full duration, to support leaders in the organization to actively work on building competencies needed to support sustained change. We recommend adding executive coaching for the leadership team (and other leaders where appropriate/needed) across the timeline. 4. Finally, we recommend adding a lessons-learned or	45	45

		retrospective for the leadership team at the end of the schedule. This DDS undertaking reflects an intentional effort to make change, develop leaders, and build strategy for the organization, and gathering participant feedback on what went well and what could be improved helps to inform future efforts. Lessons-learned events also support an effective transition and sustainable practices as the Liberum consultant team prepares to wrap-up and depart DDS.		
G		Please provide a sample strategic plan or similar that has been developed within the past 24 months.		
	COMMENT: Quality products.	Answer: Carli Easter, who leads Strategic Planning for this opportunity, facilitated the creation of DSHS' 2023-2025 Strategic Plan (as well as the Strategic Plans for cycles 19-21 and 21-23). The Strategic Plan Guide for 23-25 and associated artifacts from that effort may be viewed here: <a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a> . Also submitted with this response, please find 1. Strategic Visioning and Action Planning Workshop PPT deck, which Samantha, Jessica, and Carli created for a 3-day workshop with DSHS DVR Leadership Team in August, 2023, and 2. The Strategic Visioning Storybook which Jessica created to communicate DVR's new vision statement to staff and partners.	30	30
H		Provide a general budget narrative below that describes in detail how the budget will be associated with benchmarks and deliverables referenced in Section A(7) of the solicitation document.		
	COMMENT: Good breakdown and evening of costs.	Answer: Liberum is supporting DDS with a team of five practitioners whose expertise aligns with agency needs and desired outcomes, and will staff this engagement with two expert-level practitioners across the entire 12 months (Samantha and Jessica) pulling in subject matter experts for Strategic Planning, Leadership Development, and Mediation (Carli, Megan, and Rebecca) as required based on activities outlined in the schedule. Upon review of the proposed timeline and schedule of activities, we're aligning our hourly consultant allocation by month, and distributing hours evenly, which offers consistent and predictable costs for DDS. We anticipate a steady level of effort and engagement across the span of this work, and are focused on delivering highest level of service for the client while keeping costs consistent. DDS can anticipate monthly invoices of \$16,500, with hours broken down by consultant. The primary deliverables noted in Section A(7) of the solicitation document will be tracked for completion by Liberum and approved by DDS-identified representative(s). The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule. We consider our engagement with DDS to be a success if we meet all deliverables, as approved by DDS, on the agreed-upon schedule and within budget scope.	20	20

	I	<p>Please provide a projected invoicing schedule that considers check-ins for validation of progress with costs broken down between the following Federal Fiscal Years (FFYs):</p> <p>(1) FFY 2024 – January 1, 2024 through September 20, 2024</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024</p>		
	<p>COMMENT: All looks good.</p>	<p>Answer: As noted above, Liberum is aligning consultant hours (and therefore costs to DDS) consistently across all 12 months of this engagement. Broken down by Federal Fiscal Years, totals are as follows: (1) FFY 2024 – January 1, 2024 through September 2024: 9 months @ \$16,500/month = \$148,500 (2) FFY 2025 – October 1, 2024 through December 31, 2024: 3 months @ \$16,500/month = \$49,500 The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule.</p>	20	20



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**November 21-November 29**  
**RFX #2334-835**  
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**Vendor Name: Liberum**

**Evaluator Number: w3**

General Guidelines:

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- Do not downgrade a proposal because it did not address something that was not asked for in the Solicitation.

Scoring of Proposals

The following available points will be assigned to the proposal for evaluation purposes:

Section 5

350 points

If you have questions, please direct them to Cindy J Carroll, Solicitation Coordinator, phone 360-664-5573. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

<b>Score</b>	<b>Description</b>	<b>Discussion</b>
90-100% of available points	Exceptional	Clearly superior to that which is average.
70-80%	Above Average	Better than that which is average.
50-60%	Average	Baseline score for each item with adjustments based upon the evaluator's interpretation of the Bidder's response.
30-40%	Below Average	Substandard to that which is average.
10-20%	Failing	Non-responsive or clearly inadequate to that which is average.
0%	No Experience	Response shows no experience in this skill or capability.

**Evaluator Scoresheet for RFX #2334-835**

You will be evaluating one part of the bidder’s submission: Section 5, Bidder Qualifications and Experience. If a question requires Bidders to submit additional documents, they will be included in an attached document.

2.	BIDDER 350 Points		MAX POINTS	SCORE
	A	Describe the experiences, skills and qualifications your team possesses that are relevant to: Strategic planning, including work with MVVs, goals, objectives, action plans, and key performance indicators.	50	50
COMMENT:	<p>Answer:</p> <p>Liberum has assembled a team of expert-level consultants to support DDS with all aspects of this engagement. Specific to strategic planning, we’re offering over 13 years of cumulative experience, coupled with over 28 years of experience working with DSHS. We believe the combination of acumen in strategic planning and the understanding of the DSHS culture and organizational norms provides DDS with a holistic approach to building a comprehensive and sustainable strategic plan and associated deliverables. Our strategic planning work with DDS will be led by Carli Easter, a seasoned strategic planning expert who has the following DSHS-specific strategic planning experience: DSHS: Aging and Long-Term support Administration 2022-2023; DSHS: Office of the Secretary 2017-2022; DSHS: ESA, Division of Child Support: 2015 to 2017. Carli led the facilitation of the 2019-2021, 2021-2023 and 2023-2025 DSHS Strategic Plan (<a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a>), and joined Liberum in January 2023 as a consultant. Carli is well-versed and effective in facilitating full strategic planning, from identifying mission, vision, and values for an organization, to building the strategic plan, including goals and objectives, and creating actions plans and key performance indicators for implementation and measurement of progress. Her aim is to help DDS outline and effectively roll out their strategic plan, with an eye on how it fits into the larger DSHS context for alignment and sustainability. Carli will be joined by Jessica Armstrong, a Senior Consultant with Liberum who has over 3 years of experience leading strategic planning efforts. As DSHS’s former Strategic Project Administrator, she managed and administered project portfolio best practices, facilitating teams to identify key performance indicators and action plans to support their strategic plans. Carli and Jessica will be supported by Samantha Trotter, Liberum’s OD Practice Director and expert facilitator. Most recently (August 2023), Samantha, Jessica, and Carli partnered to facilitate DSHS’ Division of Vocational Rehabilitation Leadership Team with strategic visioning. The three day workshop culminated in a new vision statement for DVR, which was introduced to staff for feedback and discussion, and ultimately adopted and celebrated at DVR’s 2023 in-service.</p>			

B	Describe the experiences, skills and qualifications your team possesses that are relevant to: Leadership training and development from executive management level to front line supervisors.		
COMMENT:	<p><b>Answer:</b></p> <p>In all engagements, our Liberum practitioners are developing leaders, from front-line supervisors to middle managers and up to executive level. Our DDS consultant team provides the following Leadership Development expertise: Samantha Trotter has over 17 years of experience developing and delivering training for adult learners and specializes in leadership development and executive coaching. Samantha is adept at building curriculum that address learners’ needs, with engaging and useful sessions that build skill and foster positive and repeatable leader behaviors. Samantha created and implemented Supervisor Forums as DOL’s Employee Development Manager, offering monthly classes on performance management, employee engagement, and other leader concepts and competencies. Samantha is joined by Jessica Armstrong, with 16+ years of training experience and DSHS’ former Performance Transformation Manager, who led the implementation and delivery of the DSHS Performance Transformation training program that focused on leadership and OD for all DSHS managers and supervisors across WA State. Jessica’s role included executive coaching, mentoring, and consulting to support leader education. Megan Renaldo partners with Samantha and Jessica to support DDS, and brings over six years of leadership development experience. Megan served as the City of Boise Training and OD Coordinator 2018-2021, developing and delivering leadership curriculum across the organization. She’s currently an Adjunct Instructor at Boise State University, using theories of leadership and behavioral psychology, to teach students how to motivate and develop others, manage conflict, and lead teams and individuals to reach their goals. Megan also has prior experience as an HR Business Partner, designing and facilitating ongoing training and coaching for business leaders on topics including team development, performance management, and succession planning.</p> <p>In all engagements, Liberum places an emphasis on supporting leaders at all levels within an organization to fulfill their leadership role effectively. We create leader-specific trainings at the executive, middle-manager, and supervisor levels to support development of leadership competencies such as communication, coaching, prioritization, creating and aligning teams to a vision, and leading through change. We also implement leadership coaching, both in 1:1 (consultant to leader) and cohort (consultant with peer groups) models. Our practitioners are well-versed in supporting leaders to build self-awareness, identify goals, and develop and follow plans for building new skills, behaviors, and competencies.</p>	50	50
C	Describe the experiences, skills and qualifications your organization possesses that are relevant to: Business consulting services to include recommendations on best practices, decision-making models, and mediation through sticking points in the process.	50	50

	COMMENT:	<p>ANSWER:</p> <p>Liberum approaches all engagements through a lens of “leaving an organization better than we found them” by building organizational and leadership competencies. Our practitioners are well-versed in best practices in organizational development and use engagements with the client to guide and develop skill building in critical thinking, decision-making, and conflict resolution. The Liberum practitioners identified to support DDS include: Samantha Trotter, with over 20 years of supporting leaders and teams to efficiently and effectively prioritize and manage workload. Samantha is a certified Marchall Goldsmith Stakeholder-Centered coach and supports leaders to identify and address team dynamics issues, providing custom executive coaching and resources to support sustained behavior change. Samantha is joined by Rebecca Jarvis, who brings over 10 years of successful mediation experience in project, program, and operational settings. As Liberum’s Project Management Practice Director, Rebecca has over 15 years leading large-scale implementations and infrastructure projects with diverse teams. Her ability to quickly assess and effectively address conflict between individuals fosters healthy environments and builds conflict resolution skills for all involved. Rebecca also effectively builds decision-making competency via introduction of simple and effective models for organizing, prioritization, and implementation of action items. All of our practitioners on this effort have a passion for their work and approach engagements with robust experience and understanding of best practices in application. DDS can expect to learn, via observation and hands-on practice, how to effectively approach, organize, prioritize, and manage the work and people-side of this effort. Our team is committed to partnering with DDS to build competency so that this and future engagements are well-run, well-communicated, and effect sustained positive change.</p>		
D	<p>Provide the names of the key team members you will assign to this Contract, if you are the Successful Bidder, and provide their proposed roles and copies of resumes describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.</p>			
	COMMENT:	<p>ANSWER:</p> <p>Liberum has assembled a team of five of our practitioners with skills and experience perfectly aligned to the needs of DDS. Samantha Trotter, Organizational Development Director: will be the primary contact for DDS and is responsible for managing the practitioners contributing to this effort and contributing to all activities, with an emphasis on strategy, communications, leadership development, mediation, and executive coaching. Jessica Armstrong: will support all activities on the engagement, with an emphasis on Leadership Development. Carli Easter: will serve as the lead on Strategic Planning</p>	35	35

		for this effort. Megan Renaldo: will support Leadership Development on this engagement. Rebecca Jarvis: is an expert mediator and will support, train, and coach DDS leaders to resolve conflict. Rebecca is also well-versed in decision-making models and work prioritization and best practices, and will support DDS to organize and manage priorities effectively.		
E		Provide one or more sample training agendas and/or materials from a previous contract.	50	50
	COMMENT:	Answer Submitted with this response are examples of previous, similar efforts for DSHS Divisions. 1. Leading Through Change PPT from a Region 1 Leadership Team presentation at DVR in 2022. 2. Executive, Manager/Supervisor, and Employee Toolkits created for DVR in 2021. 3. The Fundamentals of OCM PPT created for DVR in 2023. 4. Effective Communication PPT from Liberum’s July 2022 OCM Help Lab (a series of free workshops provided to the community on all things Leadership, OCM, and OD). Examples from other agencies available upon request.		
F		Please provide feedback on the proposed timeline and training schedule with any recommended adjustments to timing, content, and sequence of events.	45	45
	COMMENT:	ANSWER: The Liberum team reviewed the proposed timeline and training schedule and offers the following feedback: 1. First and foremost, it is refreshing to have a client so engaged in and aware of current constraints, needs, and goals for their leaders and teams – we appreciate the thoughtful approach to this schedule and like the structure and suggested sequence of events. 2. With any engagement, we want to make sure to build rapport and familiarity with the organization and to understand the landscape of organizational structure, culture, and personalities therein. We propose doing short meet-and-greet sessions across the organization with a representative sample of staff in the first 1-1.5 months of the engagement. These sessions – typically 1:1 between a staff person and one of our consultants, would help us understand the full picture of DDS, and build positive relationships with employees. From there, our trainings, coaching, and support can be better tailored to suit the needs of DDS. The addition of these meet-and-greets would not displace or delay other activities on the schedule, but would be run in parallel. 3. Strategic Planning, Leadership Development, and intentional focus on the culture of leadership at DDS would benefit from executive coaching. Liberum typically threads executive coaching throughout all engagements, for the full duration, to support leaders in the organization to actively work on building competencies needed to support sustained change. We recommend adding executive coaching for the leadership team (and other leaders where appropriate/needed) across the timeline. 4. Finally, we recommend adding a lessons-learned or		

		retrospective for the leadership team at the end of the schedule. This DDS undertaking reflects an intentional effort to make change, develop leaders, and build strategy for the organization, and gathering participant feedback on what went well and what could be improved helps to inform future efforts. Lessons-learned events also support an effective transition and sustainable practices as the Liberum consultant team prepares to wrap-up and depart DDS.		
G		Please provide a sample strategic plan or similar that has been developed within the past 24 months.		
	COMMENT:	Answer: Carli Easter, who leads Strategic Planning for this opportunity, facilitated the creation of DSHS' 2023-2025 Strategic Plan (as well as the Strategic Plans for cycles 19-21 and 21-23). The Strategic Plan Guide for 23-25 and associated artifacts from that effort may be viewed here: <a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a> . Also submitted with this response, please find 1. Strategic Visioning and Action Planning Workshop PPT deck, which Samantha, Jessica, and Carli created for a 3-day workshop with DSHS DVR Leadership Team in August, 2023, and 2. The Strategic Visioning Storybook which Jessica created to communicate DVR's new vision statement to staff and partners.	30	30
H		Provide a general budget narrative below that describes in detail how the budget will be associated with benchmarks and deliverables referenced in Section A(7) of the solicitation document.		
	COMMENT:	Answer: Liberum is supporting DDS with a team of five practitioners whose expertise aligns with agency needs and desired outcomes, and will staff this engagement with two expert-level practitioners across the entire 12 months (Samantha and Jessica) pulling in subject matter experts for Strategic Planning, Leadership Development, and Mediation (Carli, Megan, and Rebecca) as required based on activities outlined in the schedule. Upon review of the proposed timeline and schedule of activities, we're aligning our hourly consultant allocation by month, and distributing hours evenly, which offers consistent and predictable costs for DDS. We anticipate a steady level of effort and engagement across the span of this work, and are focused on delivering highest level of service for the client while keeping costs consistent. DDS can anticipate monthly invoices of \$16,500, with hours broken down by consultant. The primary deliverables noted in Section A(7) of the solicitation document will be tracked for completion by Liberum and approved by DDS-identified representative(s). The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule. We consider our engagement with DDS to be a success if we meet all deliverables, as approved by DDS, on the agreed-upon schedule and within budget scope.	20	20

	I	<p>Please provide a projected invoicing schedule that considers check-ins for validation of progress with costs broken down between the following Federal Fiscal Years (FFYs):</p> <p>(1) FFY 2024 – January 1, 2024 through September 20, 2024</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024</p>		
	COMMENT:	<p>Answer:</p> <p>As noted above, Liberum is aligning consultant hours (and therefore costs to DDS) consistently across all 12 months of this engagement. Broken down by Federal Fiscal Years, totals are as follows:</p> <p>(1) FFY 2024 – January 1, 2024 through September 2024: 9 months @ \$16,500/month = \$148,500</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024: 3 months @ \$16,500/month = \$49,500</p> <p>The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule.</p>	20	20





<b>Score</b>	<b>Description</b>	<b>Discussion</b>
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**Evaluator Scoresheet for RFX #2334-835**

You will be evaluating one part of the bidder’s submission: Section 5, Bidder Qualifications and Experience. If a question requires Bidders to submit additional documents, they will be included in an attached document.

2.	<b>BIDDER 350 Points</b>		<b>MAX POINTS</b>	<b>SCORE</b>
A	Describe the experiences, skills and qualifications your team possesses that are relevant to: Strategic planning, including work with MVVs, goals, objectives, action plans, and key performance indicators.			
	COMMENT:	<p>Answer:</p> <p>Liberum has assembled a team of expert-level consultants to support DDS with all aspects of this engagement. Specific to strategic planning, we’re offering over 13 years of cumulative experience, coupled with over 28 years of experience working with DSHS. We believe the combination of acumen in strategic planning and the understanding of the DSHS culture and organizational norms provides DDS with a holistic approach to building a comprehensive and sustainable strategic plan and associated deliverables. Our strategic planning work with DDS will be led by Carli Easter, a seasoned strategic planning expert who has the following DSHS-specific strategic planning experience: DSHS: Aging and Long-Term support Administration 2022-2023; DSHS: Office of the Secretary 2017-2022; DSHS: ESA, Division of Child Support: 2015 to 2017. Carli led the facilitation of the 2019-2021, 2021-2023 and 2023-2025 DSHS Strategic Plan (<a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a>), and joined Liberum in January 2023 as a consultant. Carli is well-versed and effective in facilitating full strategic planning, from identifying mission, vision, and values for an organization, to building the strategic plan, including goals and objectives, and creating actions plans and key performance indicators for implementation and measurement of progress. Her aim is to help DDS outline and effectively roll out their strategic plan, with an eye on how it fits into the larger DSHS context for alignment and sustainability. Carli will be joined by Jessica Armstrong, a Senior Consultant with Liberum who has over 3 years of experience leading strategic planning efforts. As DSHS’s former Strategic Project Administrator, she managed and administered project portfolio best practices, facilitating teams to identify key performance indicators and action plans to support their strategic plans. Carli and Jessica will be supported by Samantha Trotter, Liberum’s OD Practice Director and expert facilitator. Most recently (August 2023), Samantha, Jessica, and Carli partnered to facilitate DSHS’ Division of Vocational Rehabilitation Leadership Team with strategic visioning. The three day workshop culminated in a new vision statement for DVR, which was introduced to staff for feedback and discussion, and ultimately adopted and celebrated at DVR’s 2023 in-service.</p>	50	50

B	Describe the experiences, skills and qualifications your team possesses that are relevant to: Leadership training and development from executive management level to front line supervisors.		
COMMENT:	<p><b>Answer:</b></p> <p>In all engagements, our Liberum practitioners are developing leaders, from front-line supervisors to middle managers and up to executive level. Our DDS consultant team provides the following Leadership Development expertise: Samantha Trotter has over 17 years of experience developing and delivering training for adult learners and specializes in leadership development and executive coaching. Samantha is adept at building curriculum that address learners’ needs, with engaging and useful sessions that build skill and foster positive and repeatable leader behaviors. Samantha created and implemented Supervisor Forums as DOL’s Employee Development Manager, offering monthly classes on performance management, employee engagement, and other leader concepts and competencies. Samantha is joined by Jessica Armstrong, with 16+ years of training experience and DSHS’ former Performance Transformation Manager, who led the implementation and delivery of the DSHS Performance Transformation training program that focused on leadership and OD for all DSHS managers and supervisors across WA State. Jessica’s role included executive coaching, mentoring, and consulting to support leader education. Megan Renaldo partners with Samantha and Jessica to support DDS, and brings over six years of leadership development experience. Megan served as the City of Boise Training and OD Coordinator 2018-2021, developing and delivering leadership curriculum across the organization. She’s currently an Adjunct Instructor at Boise State University, using theories of leadership and behavioral psychology, to teach students how to motivate and develop others, manage conflict, and lead teams and individuals to reach their goals. Megan also has prior experience as an HR Business Partner, designing and facilitating ongoing training and coaching for business leaders on topics including team development, performance management, and succession planning.</p> <p>In all engagements, Liberum places an emphasis on supporting leaders at all levels within an organization to fulfill their leadership role effectively. We create leader-specific trainings at the executive, middle-manager, and supervisor levels to support development of leadership competencies such as communication, coaching, prioritization, creating and aligning teams to a vision, and leading through change. We also implement leadership coaching, both in 1:1 (consultant to leader) and cohort (consultant with peer groups) models. Our practitioners are well-versed in supporting leaders to build self-awareness, identify goals, and develop and follow plans for building new skills, behaviors, and competencies.</p>	50	50
C	Describe the experiences, skills and qualifications your organization possesses that are relevant to: Business consulting services to include recommendations on best practices, decision-making models, and mediation through sticking points in the process.	50	50

	COMMENT:	<p>ANSWER:</p> <p>Liberum approaches all engagements through a lens of “leaving an organization better than we found them” by building organizational and leadership competencies. Our practitioners are well-versed in best practices in organizational development and use engagements with the client to guide and develop skill building in critical thinking, decision-making, and conflict resolution. The Liberum practitioners identified to support DDS include: Samantha Trotter, with over 20 years of supporting leaders and teams to efficiently and effectively prioritize and manage workload. Samantha is a certified Marchall Goldsmith Stakeholder-Centered coach and supports leaders to identify and address team dynamics issues, providing custom executive coaching and resources to support sustained behavior change. Samantha is joined by Rebecca Jarvis, who brings over 10 years of successful mediation experience in project, program, and operational settings. As Liberum’s Project Management Practice Director, Rebecca has over 15 years leading large-scale implementations and infrastructure projects with diverse teams. Her ability to quickly assess and effectively address conflict between individuals fosters healthy environments and builds conflict resolution skills for all involved. Rebecca also effectively builds decision-making competency via introduction of simple and effective models for organizing, prioritization, and implementation of action items. All of our practitioners on this effort have a passion for their work and approach engagements with robust experience and understanding of best practices in application. DDS can expect to learn, via observation and hands-on practice, how to effectively approach, organize, prioritize, and manage the work and people-side of this effort. Our team is committed to partnering with DDS to build competency so that this and future engagements are well-run, well-communicated, and effect sustained positive change.</p>		
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E		Provide one or more sample training agendas and/or materials from a previous contract.	50	50
	COMMENT:	Answer Submitted with this response are examples of previous, similar efforts for DSHS Divisions. 1. Leading Through Change PPT from a Region 1 Leadership Team presentation at DVR in 2022. 2. Executive, Manager/Supervisor, and Employee Toolkits created for DVR in 2021. 3. The Fundamentals of OCM PPT created for DVR in 2023. 4. Effective Communication PPT from Liberum’s July 2022 OCM Help Lab (a series of free workshops provided to the community on all things Leadership, OCM, and OD). Examples from other agencies available upon request.		
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H		Provide a general budget narrative below that describes in detail how the budget will be associated with benchmarks and deliverables referenced in Section A(7) of the solicitation document.		
	COMMENT:	Answer: Liberum is supporting DDS with a team of five practitioners whose expertise aligns with agency needs and desired outcomes, and will staff this engagement with two expert-level practitioners across the entire 12 months (Samantha and Jessica) pulling in subject matter experts for Strategic Planning, Leadership Development, and Mediation (Carli, Megan, and Rebecca) as required based on activities outlined in the schedule. Upon review of the proposed timeline and schedule of activities, we're aligning our hourly consultant allocation by month, and distributing hours evenly, which offers consistent and predictable costs for DDS. We anticipate a steady level of effort and engagement across the span of this work, and are focused on delivering highest level of service for the client while keeping costs consistent. DDS can anticipate monthly invoices of \$16,500, with hours broken down by consultant. The primary deliverables noted in Section A(7) of the solicitation document will be tracked for completion by Liberum and approved by DDS-identified representative(s). The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule. We consider our engagement with DDS to be a success if we meet all deliverables, as approved by DDS, on the agreed-upon schedule and within budget scope.	20	20

	I	<p>Please provide a projected invoicing schedule that considers check-ins for validation of progress with costs broken down between the following Federal Fiscal Years (FFYs):</p> <p>(1) FFY 2024 – January 1, 2024 through September 20, 2024</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024</p>		
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**WRITTEN RESPONSE SCORING**  
**November 21-November 29**  
**RFX #2334-835**  
**Business Consulting and Strategic Planning**

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**Vendor Name: Liberum**

**Evaluator Number: 5**

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score based on the criteria only.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- We would prefer that you leave a comment for each question scored, briefly explaining why you assigned that particular score.
- You may discuss the proposals among the evaluation team, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something that was not asked for in the Solicitation.

Scoring of Proposals

The following available points will be assigned to the proposal for evaluation purposes:

Section 5	350 points
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If you have questions, please direct them to Cindy J Carroll, Solicitation Coordinator, phone 360-664-5573. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

<b>Score</b>	<b>Description</b>	<b>Discussion</b>
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0%	No Experience	Response shows no experience in this skill or capability.

**Evaluator Scoresheet for RFX #2334-835**

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2.	BIDDER 350 Points		MAX POINTS	SCORE
	A	Describe the experiences, skills and qualifications your team possesses that are relevant to: Strategic planning, including work with MVVs, goals, objectives, action plans, and key performance indicators.	50	50
COMMENT:	<p>Answer:</p> <p>Liberum has assembled a team of expert-level consultants to support DDS with all aspects of this engagement. Specific to strategic planning, we’re offering over 13 years of cumulative experience, coupled with over 28 years of experience working with DSHS. We believe the combination of acumen in strategic planning and the understanding of the DSHS culture and organizational norms provides DDS with a holistic approach to building a comprehensive and sustainable strategic plan and associated deliverables. Our strategic planning work with DDS will be led by Carli Easter, a seasoned strategic planning expert who has the following DSHS-specific strategic planning experience: DSHS: Aging and Long-Term support Administration 2022-2023; DSHS: Office of the Secretary 2017-2022; DSHS: ESA, Division of Child Support: 2015 to 2017. Carli led the facilitation of the 2019-2021, 2021-2023 and 2023-2025 DSHS Strategic Plan (<a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a>), and joined Liberum in January 2023 as a consultant. Carli is well-versed and effective in facilitating full strategic planning, from identifying mission, vision, and values for an organization, to building the strategic plan, including goals and objectives, and creating actions plans and key performance indicators for implementation and measurement of progress. Her aim is to help DDS outline and effectively roll out their strategic plan, with an eye on how it fits into the larger DSHS context for alignment and sustainability. Carli will be joined by Jessica Armstrong, a Senior Consultant with Liberum who has over 3 years of experience leading strategic planning efforts. As DSHS’s former Strategic Project Administrator, she managed and administered project portfolio best practices, facilitating teams to identify key performance indicators and action plans to support their strategic plans. Carli and Jessica will be supported by Samantha Trotter, Liberum’s OD Practice Director and expert facilitator. Most recently (August 2023), Samantha, Jessica, and Carli partnered to facilitate DSHS’ Division of Vocational Rehabilitation Leadership Team with strategic visioning. The three day workshop culminated in a new vision statement for DVR, which was introduced to staff for feedback and discussion, and ultimately adopted and celebrated at DVR’s 2023 in-service.</p>			

B	Describe the experiences, skills and qualifications your team possesses that are relevant to: Leadership training and development from executive management level to front line supervisors.		
COMMENT:	<p><b>Answer:</b></p> <p>In all engagements, our Liberum practitioners are developing leaders, from front-line supervisors to middle managers and up to executive level. Our DDS consultant team provides the following Leadership Development expertise: Samantha Trotter has over 17 years of experience developing and delivering training for adult learners and specializes in leadership development and executive coaching. Samantha is adept at building curriculum that address learners’ needs, with engaging and useful sessions that build skill and foster positive and repeatable leader behaviors. Samantha created and implemented Supervisor Forums as DOL’s Employee Development Manager, offering monthly classes on performance management, employee engagement, and other leader concepts and competencies. Samantha is joined by Jessica Armstrong, with 16+ years of training experience and DSHS’ former Performance Transformation Manager, who led the implementation and delivery of the DSHS Performance Transformation training program that focused on leadership and OD for all DSHS managers and supervisors across WA State. Jessica’s role included executive coaching, mentoring, and consulting to support leader education. Megan Renaldo partners with Samantha and Jessica to support DDS, and brings over six years of leadership development experience. Megan served as the City of Boise Training and OD Coordinator 2018-2021, developing and delivering leadership curriculum across the organization. She’s currently an Adjunct Instructor at Boise State University, using theories of leadership and behavioral psychology, to teach students how to motivate and develop others, manage conflict, and lead teams and individuals to reach their goals. Megan also has prior experience as an HR Business Partner, designing and facilitating ongoing training and coaching for business leaders on topics including team development, performance management, and succession planning.</p> <p>In all engagements, Liberum places an emphasis on supporting leaders at all levels within an organization to fulfill their leadership role effectively. We create leader-specific trainings at the executive, middle-manager, and supervisor levels to support development of leadership competencies such as communication, coaching, prioritization, creating and aligning teams to a vision, and leading through change. We also implement leadership coaching, both in 1:1 (consultant to leader) and cohort (consultant with peer groups) models. Our practitioners are well-versed in supporting leaders to build self-awareness, identify goals, and develop and follow plans for building new skills, behaviors, and competencies.</p>	50	50
C	Describe the experiences, skills and qualifications your organization possesses that are relevant to: Business consulting services to include recommendations on best practices, decision-making models, and mediation through sticking points in the process.	50	50

	COMMENT:	<p>ANSWER:</p> <p>Liberum approaches all engagements through a lens of “leaving an organization better than we found them” by building organizational and leadership competencies. Our practitioners are well-versed in best practices in organizational development and use engagements with the client to guide and develop skill building in critical thinking, decision-making, and conflict resolution. The Liberum practitioners identified to support DDS include: Samantha Trotter, with over 20 years of supporting leaders and teams to efficiently and effectively prioritize and manage workload. Samantha is a certified Marchall Goldsmith Stakeholder-Centered coach and supports leaders to identify and address team dynamics issues, providing custom executive coaching and resources to support sustained behavior change. Samantha is joined by Rebecca Jarvis, who brings over 10 years of successful mediation experience in project, program, and operational settings. As Liberum’s Project Management Practice Director, Rebecca has over 15 years leading large-scale implementations and infrastructure projects with diverse teams. Her ability to quickly assess and effectively address conflict between individuals fosters healthy environments and builds conflict resolution skills for all involved. Rebecca also effectively builds decision-making competency via introduction of simple and effective models for organizing, prioritization, and implementation of action items. All of our practitioners on this effort have a passion for their work and approach engagements with robust experience and understanding of best practices in application. DDS can expect to learn, via observation and hands-on practice, how to effectively approach, organize, prioritize, and manage the work and people-side of this effort. Our team is committed to partnering with DDS to build competency so that this and future engagements are well-run, well-communicated, and effect sustained positive change.</p>		
D	<p>Provide the names of the key team members you will assign to this Contract, if you are the Successful Bidder, and provide their proposed roles and copies of resumes describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.</p>			
	COMMENT:	<p>ANSWER:</p> <p>Liberum has assembled a team of five of our practitioners with skills and experience perfectly aligned to the needs of DDS. Samantha Trotter, Organizational Development Director: will be the primary contact for DDS and is responsible for managing the practitioners contributing to this effort and contributing to all activities, with an emphasis on strategy, communications, leadership development, mediation, and executive coaching. Jessica Armstrong: will support all activities on the engagement, with an emphasis on Leadership Development. Carli Easter: will serve as the lead on Strategic Planning</p>	35	35

		for this effort. Megan Renaldo: will support Leadership Development on this engagement. Rebecca Jarvis: is an expert mediator and will support, train, and coach DDS leaders to resolve conflict. Rebecca is also well-versed in decision-making models and work prioritization and best practices, and will support DDS to organize and manage priorities effectively.		
E		Provide one or more sample training agendas and/or materials from a previous contract.	50	50
	COMMENT:	Answer Submitted with this response are examples of previous, similar efforts for DSHS Divisions. 1. Leading Through Change PPT from a Region 1 Leadership Team presentation at DVR in 2022. 2. Executive, Manager/Supervisor, and Employee Toolkits created for DVR in 2021. 3. The Fundamentals of OCM PPT created for DVR in 2023. 4. Effective Communication PPT from Liberum’s July 2022 OCM Help Lab (a series of free workshops provided to the community on all things Leadership, OCM, and OD). Examples from other agencies available upon request.		
F		Please provide feedback on the proposed timeline and training schedule with any recommended adjustments to timing, content, and sequence of events.	45	45
	COMMENT:	ANSWER: The Liberum team reviewed the proposed timeline and training schedule and offers the following feedback: 1. First and foremost, it is refreshing to have a client so engaged in and aware of current constraints, needs, and goals for their leaders and teams – we appreciate the thoughtful approach to this schedule and like the structure and suggested sequence of events. 2. With any engagement, we want to make sure to build rapport and familiarity with the organization and to understand the landscape of organizational structure, culture, and personalities therein. We propose doing short meet-and-greet sessions across the organization with a representative sample of staff in the first 1-1.5 months of the engagement. These sessions – typically 1:1 between a staff person and one of our consultants, would help us understand the full picture of DDS, and build positive relationships with employees. From there, our trainings, coaching, and support can be better tailored to suit the needs of DDS. The addition of these meet-and-greets would not displace or delay other activities on the schedule, but would be run in parallel. 3. Strategic Planning, Leadership Development, and intentional focus on the culture of leadership at DDS would benefit from executive coaching. Liberum typically threads executive coaching throughout all engagements, for the full duration, to support leaders in the organization to actively work on building competencies needed to support sustained change. We recommend adding executive coaching for the leadership team (and other leaders where appropriate/needed) across the timeline. 4. Finally, we recommend adding a lessons-learned or		

		retrospective for the leadership team at the end of the schedule. This DDS undertaking reflects an intentional effort to make change, develop leaders, and build strategy for the organization, and gathering participant feedback on what went well and what could be improved helps to inform future efforts. Lessons-learned events also support an effective transition and sustainable practices as the Liberum consultant team prepares to wrap-up and depart DDS.		
G		Please provide a sample strategic plan or similar that has been developed within the past 24 months.		
	COMMENT:	Answer: Carli Easter, who leads Strategic Planning for this opportunity, facilitated the creation of DSHS' 2023-2025 Strategic Plan (as well as the Strategic Plans for cycles 19-21 and 21-23). The Strategic Plan Guide for 23-25 and associated artifacts from that effort may be viewed here: <a href="https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide">https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide</a> . Also submitted with this response, please find 1. Strategic Visioning and Action Planning Workshop PPT deck, which Samantha, Jessica, and Carli created for a 3-day workshop with DSHS DVR Leadership Team in August, 2023, and 2. The Strategic Visioning Storybook which Jessica created to communicate DVR's new vision statement to staff and partners.	30	30
H		Provide a general budget narrative below that describes in detail how the budget will be associated with benchmarks and deliverables referenced in Section A(7) of the solicitation document.		
	COMMENT:	Answer: Liberum is supporting DDS with a team of five practitioners whose expertise aligns with agency needs and desired outcomes, and will staff this engagement with two expert-level practitioners across the entire 12 months (Samantha and Jessica) pulling in subject matter experts for Strategic Planning, Leadership Development, and Mediation (Carli, Megan, and Rebecca) as required based on activities outlined in the schedule. Upon review of the proposed timeline and schedule of activities, we're aligning our hourly consultant allocation by month, and distributing hours evenly, which offers consistent and predictable costs for DDS. We anticipate a steady level of effort and engagement across the span of this work, and are focused on delivering highest level of service for the client while keeping costs consistent. DDS can anticipate monthly invoices of \$16,500, with hours broken down by consultant. The primary deliverables noted in Section A(7) of the solicitation document will be tracked for completion by Liberum and approved by DDS-identified representative(s). The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule. We consider our engagement with DDS to be a success if we meet all deliverables, as approved by DDS, on the agreed-upon schedule and within budget scope.	20	20

	I	<p>Please provide a projected invoicing schedule that considers check-ins for validation of progress with costs broken down between the following Federal Fiscal Years (FFYs):</p> <p>(1) FFY 2024 – January 1, 2024 through September 20, 2024</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024</p>		
	COMMENT:	<p>Answer:</p> <p>As noted above, Liberum is aligning consultant hours (and therefore costs to DDS) consistently across all 12 months of this engagement. Broken down by Federal Fiscal Years, totals are as follows:</p> <p>(1) FFY 2024 – January 1, 2024 through September 2024: 9 months @ \$16,500/month = \$148,500</p> <p>(2) FFY 2025 – October 1, 2024 through December 31, 2024: 3 months @ \$16,500/month = \$49,500</p> <p>The consultant team will be conducting monthly check-ins with DDS Leadership ahead of invoicing, to ensure activities, engagements, and deliverables are progressing according to schedule.</p>	20	20