
ORAL INTERVIEW SCORING
January 25-26, 2024
RFX # 2334-835
Business Consulting and Strategic Planning

Vendor Name: **Liberum**

Evaluator Number: **1**

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score only based on the Vendor's response in each competency area.
- 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.
- You may discuss the proposals among the evaluation team after the interviews, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something outside of the competency areas being judged.

The Oral Evaluation is comprised of two parts: a 20 minute presentation from the vendor on why they are the best choice for this project. Followed by 20 minutes of Q&A, there are three specific questions that have been outlined for this portion.

The presentation from the candidate is worth a maximum of 70 points (30 points for the presentation itself, 30 points for organizational fit, and 10 points for miscellaneous factors such as flexibility). Panel Questions will be scored at a maximum of 10 points each. The oral evaluation is worth a total of 100 points.

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

Oral Evaluation Presentation Information and Scoring:

A 20 minute presentation on why your organization is best suited to successfully handle this project.

- **Points break down is as follows:**
 - o **30 points for the presentation itself 27**
 - o **30 points for organizational fit 28**
 - o **10 points for miscellaneous factors such as flexibility 10**
- **Please make clear notes on each item in the space below.**

Points Awarded 65 out of 70

Oral Evaluator General Notes on Presentation:

Samantha Trotter and Megan Renolda conducted presentation. There will be three other people. PNW, certified small business. Not cookie cutter and tailed to specific client. Jessica Armstrong, Carli Easter, and Rebecca Jarvis will be the other members. Samantha made some great comments about bringing people through change. Bullet points on "Our Approach" hit a lot of the major categories we are looking for. Doesn't shy away from what's difficult or uncomfortable, and handles those situations in a tactful manner. I enjoyed hearing about what Samantha had to say about fear and how that relates to conflict resolution by getting to root of the issue. Doesn't have experience with Enneagram but could definitely look into it, but different assessments are better suited for specific desired outcomes. Lean Six Sigma is what they referenced for process improvement, but may branch off. One missing element perhaps was the training of the ELT versus EMT. Presentation was conducted within the allocated timeframe adjusted for some follow-up questions asked by panel.

Oral Evaluator Scoring, Q&A Section:

Question 1. What's going to be the most difficult part of guiding us to success and how is your company best positioned to get us through this?

Comments

Had questions already laid out and outlined in their presentation. Building authentic buy-in. Not just about delivery, but about behavior change. A lot of research shows it's not just about the training, but training in conjunction with other elements. Priorization and

where does this fit within other priorities. Mark followed with a question about change fatigue and disengagement. Always a root cause for a person's behavior. Need to identify and address those root causes. Our team is positioned to identify the true need and root causes of how things are or are not working, then we build strategy and engagement to address to address and achieve outcomes.

Points Awarded ____9____ out of 10

Question 2. As a collaborator with our team, what are your approaches to working through and resolving differing perspectives so we can focus on obtaining contract goals?

Comments

This is where transparent communication, mediation, and conflict resolution come in. Will address people based on what they need to know and understand. Develop understanding of needs/wants of those involved (that will explain why they're showing up the way they are) – what feels at risk to them. Medicate/facilitate individuals and teams through addressing those questions/worries, which an eye to desired outcome. Collaborative approach to mediation/conflict resolution. Modeling effective communication and conflict resolution as we go, so future conflicts are easier to handle.

Points Awarded ____9____ out of 10

Question 3. Are there any missing components to what we've requested that will undermine our chances at success in leader development and/or strong SP creation and sustainment?

Comments

Strategic planning has to be done in alignment, up and down the organizational chart, and connected to our work in the Leadership Development space. Make sure this isn't just checking the box, we'll need to build a robust rollout plan people follow to ensure sustainment. Include consultant readiness work at the beginning, we'll do interviews across DDS to get a sense of the environment and those participating and impacted by the work, so our approach isn't misaligned with true needs. This may be the first month or two. Executive/Leadership coaching is needed throughout the whole engagement. Good change is good leadership, we'll support your team to become more self aware and effective leaders.

Points Awarded ____9____ out of 10

Total: 92 / 100

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Vendor Name: Liberum

Evaluator Number: 2

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Oral Evaluation Presentation Information and Scoring:

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Points Awarded 65 out of 70

Oral Evaluator General Notes on Presentation:

Presentation slides were occasionally out of sync from the conversation - pacing and material displayed. Examples: Some slides were mostly where others had none. Some text base slides were skipped over. The one slide with all negative experiences towards strategic planning seemed at odds with the presentation.

Oral Evaluator Scoring, Q&A Section:

Question 1. What's going to be the most difficult part of guiding us to success and how is your company best positioned to get us through this?

Points Awarded ___10_____ out of 10

Question 2. As a collaborator with our team, what are your approaches to working through and resolving differing perspectives so we can focus on obtaining contract goals?

Comments

Points Awarded ___10_____ out of 10

Question 3. Are there any missing components to what we've requested that will undermine our chances at success in leader development and/or strong SP creation and sustainment?

Comments

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Points Awarded ___10_____ out of 10

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Oral Evaluation Presentation Information and Scoring:

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Points Awarded 67 out of 70

Oral Evaluator General Notes on Presentation:

Fantastic presentation with all contract deliverables well addressed. Well addressed the need for OCM heavy approach through all phases of the journey. Nice blend of PM,OCM,OD in the approach.

Very good fit with experience in DSHS for the work we need done nicely counter-balanced with experiences outside of the department. Provided a clear merger of LD and SP experience and how this work is intrinsically tied along with the approach they will take to make implementation (and post-implementation) work.

Great conflict resolution approaches for interpersonal and process challenges.

Oral Evaluator Scoring, Q&A Section:

Question 1. What's going to be the most difficult part of guiding us to success and how is your company best positioned to get us through this?

Comments

Great answer centered on the commitments we'll need to make (buy-in and behavior modification) along with a process approach with individualized coaching as needed to make it work

Points Awarded _____9_____ out of 10

Question 2. As a collaborator with our team, what are your approaches to working through and resolving differing perspectives so we can focus on obtaining contract goals?

Comments

Good answer centered on communication, conflict resolution and mediation. Discussed use of Clifton Strengths as a toll in this arena.

Points Awarded ____8____ out of 10

Question 3. Are there any missing components to what we've requested that will undermine our chances at success in leader development and/or strong SP creation and sustainment?

Comments

Great additions aptly pointing out the needed connection of LD & SP efforts throughout with both vertical and horizontal connection, augmented by deliberate and consistent coaching.

Points Awarded 10 out of 10