

Attachment B

Date: November 12th, 2023
 Bidder Name: Liberum, LLC.
 Address of Bidder’s Principal Place of Business:
 17411 Snohomish Ave.
 Snohomish, WA 98296
 Bidder’s Telephone Number: 425.999.4256 x201
 Bidder’s Fax Number: 425.999.4256
 Bidder’s Email Address: bcarr@liberumnow.com
 Name of Contract Person, if different from Bidder Name: Brent Carr

Re: Response Submission for DSHS Competitive Solicitation #2334-835

Dear Sir or Madam:

1. Enclosed please find the Response of Liberum, LLC. (Bidder) with respect to the above Competitive Solicitation. This Response includes this Letter (Attachment B) as well as Attachments C (Bidder Certifications), D (Bidder Response Form), and E (Contractor Inclusion Plan), as set forth in the Solicitation Document. In addition to these completed Attachments, the response includes the following additional materials (if any): Sample documents requested in Attachment D: Questions 5-E, Question 5-G, and resumes requested in Attachment D: Question 5-D.
2. I am authorized to submit this Response on behalf of Bidder, to make representations on behalf of Bidder and to commit Bidder contractually.
3. I have read the Solicitation Document and Sample Contract. In submitting this Response, Bidder accepts all terms and conditions stated in the Solicitation Document, including those set forth in the following amendments which Bidder has downloaded (please complete, indicating if no amendments were issued):

Amendment Number(s)	Date(s) Issued
<u>1</u>	<u>11/2/23</u>
<u>2</u>	<u>11/6/23</u>

No Amendments were issued with respect to this RFP

4. Bidder represents that it meets all minimum qualifications set forth in this DSHS Competitive Solicitation and is capable, willing and able to perform the services described in the DSHS Competitive Solicitation within the time frames set forth for performance.
5. **BY MY SIGNATURE BELOW, I CERTIFY THAT ALL STATEMENTS AND INFORMATION PROVIDED IN BIDDER’S RESPONSE ARE TRUE AND COMPLETE.**

SINCERELY,



Brent Carr
 Partner

Attachment C Bidder Certifications and Assurances

Bidder must sign and include the full text of this Attachment C with the Response. Altering or conditioning your certification of this Attachment C may result in your bid being disqualified.

Under the penalties of perjury of the State of Washington, Bidder makes the following certifications and assurances as a required element of its Response to this Competitive Solicitation. Bidder affirms the truthfulness of these facts and acknowledges its current and continued compliance with these certifications and assurances as part of its Response and any resulting contract that may be awarded by DSHS.

1. Bidder declares that all answers and statements made in Bidder's Response are true and correct.
2. Bidder certifies that its Response is a firm offer for a period of 180 days following receipt by DSHS, and it may be accepted by DSHS without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 180-day period. In the case of a protest, the Bidder's Response will remain valid for 210 days or until the protest is resolved, whichever is later.
3. Bidder has not been assisted by any current or former DSHS employee whose duties relate (or did relate) to this Solicitation and who assisted in other than his or her official, public capacity. If there are any exceptions to these assurances or if Bidder has been assisted, Bidder will identify on a separate page attached to this document each individual by: (a) name, (b) current address and telephone number, (c) current or former position with DSHS, (d) dates of employment with DSHS, and (e) detailed description of the assistance provided by that individual.
4. Bidder certifies that Bidder is not currently bankrupt or a party to bankruptcy proceedings and has not made an assignment for benefit of creditors and authorizes DSHS to conduct a financial assessment of Bidder in DSHS' sole discretion.
5. Bidder acknowledges that DSHS will not reimburse Bidder for any costs incurred in the preparation of Bidder's Response. All Responses shall be the property of DSHS. Bidder claims no proprietary right to the ideas, writings, items or samples submitted as part of its Response.
6. Bidder acknowledges that any contract award will incorporate terms set forth in the Sample Contract(s), including its attachments and exhibits, as set forth as Attachment A to the Solicitation Document, or may, at DSHS' option be negotiated further. DSHS may elect to incorporate all or any part of Bidder's Response into the Contract.
7. Bidder certifies that it has made no attempt, nor will make any attempt, to induce any other person or firm to submit, or not submit, a Response for the purpose of restricting competition and that the prices and/or cost data contained in Bidder's Response: (a) have been determined independently, without consultation, communication or agreement with others for the purpose of restricting competition or influencing bid selection, and (b) have not been and will not be knowingly disclosed by the Bidder, directly

or indirectly, to any other Bidder or competitor before contract award, except to the extent that Bidder has joined with other individuals or organizations for the purpose of preparing and submitting a joint Response or unless otherwise required by law.

8. Bidder acknowledges that if it is awarded a contract containing Business Associate requirements under the Health Insurance Portability and Accountability Act of 1996 (HIPAA), or any other Data Security requirements, that Bidder will incorporate the terms of such Business Associate or Data Security requirements into all related subcontracts.

9. Bidder acknowledges that if awarded a contract with DSHS, Bidder is required to comply with all applicable state and federal civil rights and other laws. Failure to comply may result in contract termination. Bidder agrees to submit additional information about its nondiscrimination policies, at any time, if requested by DSHS.

10. Bidder certifies that Bidder has not, within the three-year period immediately preceding the date of release of this competitive solicitation, been determined by a final and binding citation and notice of assessment issued by the Department of Labor and Industries or through a civil judgment to have willfully violated state minimum wage laws (RCW 49.38.082; Chapters 49.46 RCW, 49.48 RCW, or 49.52 RCW).

11. Bidder certifies that it has a current Business License and agrees that it will promptly secure and provide a copy of its Washington State Business License, unless Bidder is exempted from being required to have one, if Bidder is awarded a contract.

12. Bidder authorizes DSHS to conduct a background check of Bidder or Bidder's employees if DSHS considers such action necessary or advisable.


13. Bidder has not been convicted nor entered a plea of *nolo contendere* with respect to a criminal offense, nor has Bidder been debarred or otherwise restricted from participating in any public contracts.

14. Bidder certifies that Bidder has not willfully violated Washington state's wage payment laws within the last three years.

15. Bidder certifies that Bidder is not presently an agency of the Russian government, an entity which is Russian-state owned to any extent, or an entity sanctioned by the United States government in response to Russia's invasion of Ukraine.

16. Bidder acknowledges its obligation to notify DSHS of any changes in the certifications and assurances above.

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein.

Bidder's Signature:  _____
Title: Partner
Organization Name: Liberum, LLC.
Date: 11/12/23
Place Signed (City, State): Snohomish, WA

ATTACHMENT D: BIDDER RESPONSE FORM This form is broken into Seven sections: Section 1. Administrative Response; Section 2. EO 18-03 Response; Section 3. Washington Small Business; Section 4. Certified Washington Veteran-owned Business; Section 5. Management Response; Section 6. Technical Response; and Section 7. Quotation/Cost Proposal. Bidders must respond to all questions in the order and in the expandable space provided. If a question requires Bidder to submit additional documents, please attach them to this document and label them clearly as part of your response to this Attachment D.		
1	BIDDER INFORMATION (ADMINISTRATIVE RESPONSE) Bidder's response to the questions in this Section 1, combined with the information provided in Bidder's Submittal Letter and Certifications and Assurances, comprise Bidder's Administrative Response to this Solicitation. While the Administrative Response is not given a number score, the information provided as part of Bidder's Administrative Response may cause the Bid to be disqualified and may be considered in evaluating Bidder's qualifications and experience.	MAXIMUM TOTAL POINTS
a	Please indicate whether you employ or Contract with current or former state employees. If the answer is yes, provide the following information with respect to each individual: 1. name of employee or contractor; 2. the individual's employment history with the State of Washington; 3. a description of the Individual's involvement with the response to this Solicitation; and 4. the Individual's proposed role in providing the services under this any Contract that may be awarded.	NOT SCORED
	ANSWER: Liberum employs several former State employees, as we believe State experience coupled with subject matter expertise creates well-rounded and adept consultants who know how to most effectively partner with employees and teams. Our proposed consultants on this opportunity include three former State employees, with years of experience as follows: 1. Samantha Trotter, Liberum's Organizational Development Director. 2. Department of Children, Youth, and Families: Organizational Change Management Administrator 2018-2019. Department of Licensing (DOL): Employee Development Manager 2015-2018. DOL: Management Analyst 2014-2015. Liquor and Cannabis Board: Executive Assistant 2010-2013. 3. Samantha led the coordination of Liberum's response to this opportunity. 4. Samantha will be the primary point of contact for DDS and is responsible for managing the team of practioners contributing to this effort. Her focus will be strategy, communications, leadership development, mediation, and executive coaching, in partnership with her team. 1. Jessica Armstrong , Liberum Senior Organizational Change Management Consultant. 2. Department of Social and Health Services (DSHS): HR Strategic Project Administrator 2019-2022. One Washington: Organizational Change Management Director 2021. DSHS: Organizational Change Manager 2017-2019. DSHS: Performance Transformation Manager 2015-2017. DSHS: Information Technology Specialist 2007-2014. 3. Jessica contributed her OD expertise to this response, reviewing the draft timeline and providing feedback on approach. 4. Jessica will support this DDS effort for the full length of the engagement, leading Leadership Development in partnership with her teammates. 1. Carli Easter, Liberum Organizational Change Management Consultant. 2. DSHS: Planning and Labor Management Manager 2022-2023. DSHS: Strategy and Planning Manager 2017-2022. DSHS: Performance Management Analyst 5 2015-2017. DSHS: Developmental Job Assignment 2015.	

Bidder Name _____

	DSHS: Loss Prevention Consultant 2014-2015. Labor and Industries: Customer Service Specialist 2 2011. 3. Carli contributed her Strategic Planning expertise to this response, reviewing the timeline and providing feedback on approach. 4. Carli will support this DDS effort by leading the Strategic Planning component, in partnership with her teammates.	
b	Please list the names and contact information of three individuals you agree may serve as Bidder references and may freely provide information to DSHS regarding the reference’s experience and impressions of Bidder. In providing these names, Bidder represents that it shall hold both DSHS and the organizations and individuals providing a reference harmless from and against any and all liability for seeking and providing such reference.	NOT SCORED
	ANSWER: Cassi Villegas, DSHS DVR Interim Director: cassi.villegas@dshs.wa.gov ; 360.764.0731. Kristine Miller, Deputy Chief of Staff, Mayor’s Office City of Boise: kmmiller@cityofboise.org ; 208.972.8517. Marika Barto, L&I Chief Equity and Belonging Partner: marika.barto@lni.wa.gov ; 206.437.6192.	
c	Please indicate whether your Response contains any variations from the requirements of the Solicitation Document. If the answer is yes, list each variation with specificity and include the pertinent page numbers containing the variation.	NOT SCORED
	ANSWER: No variations in our response.	
d	Please indicate whether you are requesting that DSHS consider any exceptions and/or revisions to the sample contract language found in Attachment A. If so, state the page of Attachment A on which the text you request to change is found, and state the specific changes you are requesting. DSHS shall be under no obligation to agree to any requested changes, and will not consider changes to contract language or negotiate any new language not identified in response to this question.	NOT SCORED
	ANSWER: No exceptions and/or revisions requested	
e	If Bidder considers any information that is submitted as part of its Response to be proprietary, please identify the numbered pages of Bidder’s Response containing such information and place the word “Proprietary” in the lower right hand corner of each of these identified pages.	NOT SCORED
	ANSWER: No – No proprietary information	
f	Please indicate whether you have had a contract terminated for cause or default within the past five (5) years. If so, please provide the terminating party’s name, address and telephone number and provide a summary describing the alleged deficiencies in Bidder’s performance, whether and how these alleged deficiencies were remedied and any other information pertinent to Bidder’s position on the matter. “Termination for Cause” refers to any notice to Bidder to stop performance due to Bidder’s asserted nonperformance or poor performance and the issue was either (a) not litigated; (b) litigated with a resulting determination in favor of the other party; or (c) is the subject of pending litigation.	NOT SCORED
	ANSWER: No – Liberum has had no contract terminations for cause or default.	
g	Please identify any prior contracts Bidder has entered into with the State of Washington within the past ten (10) years and identify the dates and nature of the contract and primary agency contact for each.	NOT SCORED
	ANSWER: Below are contracts Liberum has entered into in the last 10 years. Washington state agencies continue to rely on Liberum’s services the most important initiatives in their organization. The nature of these services include: OD –	

Bidder Name _____

	<p>Organizational Development, PM – Project Management, and OCM – Organizational Change Management.</p> <table border="1"> <thead> <tr> <th>Contract Name</th> <th>Number</th> <th>Project(s)</th> <th>Nature</th> <th>Date of Service</th> <th>Key Contact</th> </tr> </thead> <tbody> <tr> <td>Department of Corrections</td> <td>K12052</td> <td>ERP</td> <td>OD/OCM</td> <td>7/1/2019 - current</td> <td>Lindsey Konrad</td> </tr> <tr> <td>Consolidated Tech. Services</td> <td>22-063</td> <td>WaTech Expert</td> <td>PM</td> <td>1/27/22 - current</td> <td>Amy Pearson</td> </tr> <tr> <td>Dept of Services for the Blind</td> <td>DSB22-0010</td> <td>OneWa</td> <td>PM/OCM</td> <td>7/1/22 - current</td> <td>Michael MacKillop</td> </tr> <tr> <td>DSHS</td> <td>2236-45050</td> <td>WA CARES</td> <td>OD/OCM</td> <td>10/2022 – current</td> <td>Ben Veghte</td> </tr> <tr> <td>DSHS</td> <td>2122-21491</td> <td>SILAS</td> <td>PM/OCM</td> <td>1/2018 – current</td> <td>Jay Minton</td> </tr> <tr> <td>DSHS</td> <td>2023-86013</td> <td>BMMP</td> <td>OD/OCM/PM</td> <td>6/2020 – current</td> <td>Cassie Villegas</td> </tr> <tr> <td>Dept of Labor and Industry</td> <td>K5334</td> <td>Equity OECM</td> <td>OD/OCM</td> <td>8/14/2023 - current</td> <td>Marika Barto</td> </tr> <tr> <td>Department of Agriculture</td> <td>K4446</td> <td>OneWa Support</td> <td>PM/OCM</td> <td>4/18/23 - current</td> <td>Natasha Roberts</td> </tr> <tr> <td>Department of Transportation</td> <td>K1136</td> <td>CSR</td> <td>PM/OCM</td> <td>7/2017 - current</td> <td>Jennifer Dahl</td> </tr> <tr> <td>Department of Transportation</td> <td>K1592</td> <td>PROPEL OCM</td> <td>OCM</td> <td>7/2023 - current</td> <td>Heidi Olson</td> </tr> <tr> <td>Department of Transportation</td> <td>K1149</td> <td>PROPEL</td> <td>PM/OCM</td> <td>9/2017 - current</td> <td>Jennifer Dahl</td> </tr> <tr> <td>Department of Health</td> <td>PRV26375</td> <td>COVID</td> <td>PM</td> <td>6/21/21 - 10/31/22</td> <td>Brian Mannion</td> </tr> <tr> <td>Department of Ecology</td> <td>C 1800035</td> <td>IRMS</td> <td>PM/OCM</td> <td>8/2/17 - 9/30/21</td> <td>Lisa Darnell</td> </tr> </tbody> </table>	Contract Name	Number	Project(s)	Nature	Date of Service	Key Contact	Department of Corrections	K12052	ERP	OD/OCM	7/1/2019 - current	Lindsey Konrad	Consolidated Tech. Services	22-063	WaTech Expert	PM	1/27/22 - current	Amy Pearson	Dept of Services for the Blind	DSB22-0010	OneWa	PM/OCM	7/1/22 - current	Michael MacKillop	DSHS	2236-45050	WA CARES	OD/OCM	10/2022 – current	Ben Veghte	DSHS	2122-21491	SILAS	PM/OCM	1/2018 – current	Jay Minton	DSHS	2023-86013	BMMP	OD/OCM/PM	6/2020 – current	Cassie Villegas	Dept of Labor and Industry	K5334	Equity OECM	OD/OCM	8/14/2023 - current	Marika Barto	Department of Agriculture	K4446	OneWa Support	PM/OCM	4/18/23 - current	Natasha Roberts	Department of Transportation	K1136	CSR	PM/OCM	7/2017 - current	Jennifer Dahl	Department of Transportation	K1592	PROPEL OCM	OCM	7/2023 - current	Heidi Olson	Department of Transportation	K1149	PROPEL	PM/OCM	9/2017 - current	Jennifer Dahl	Department of Health	PRV26375	COVID	PM	6/21/21 - 10/31/22	Brian Mannion	Department of Ecology	C 1800035	IRMS	PM/OCM	8/2/17 - 9/30/21	Lisa Darnell	
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h	<p>Please indicate whether Bidder has been the subject of a lawsuit or administrative proceeding alleging a failure to comply with laws relating to the types of services Bidder proposes to provide pursuant to this Competitive Solicitation. If the answer is yes, please list the nature of the allegations, docket number, disposition and date (if applicable) and Bidder’s explanation of how it has changed its practices or operations relative to any alleged deficiencies since that proceeding was filed.</p>	NOT SCORED																																																																																				
	<p>ANSWER: No – Liberum has not been the subject of any such lawsuits or administrative proceedings.</p>																																																																																					
i	<p>Please describe your proposed plans for the use of Subcontractors in performing this Contract, listing each Subcontractor, its proposed role, and the estimated percentage of the Contract that will be performed by each Subcontractor. Please indicate whether each Subcontractor self-identifies or is certified as a Washington small business, a minority-owned business, a woman-owned business, a disadvantaged business enterprise, or a veteran-owned business. If the answer is yes, please identify the type of organization(s) and provide details of any certifications. Note that all Subcontractors must be approved by DSHS.</p>	NOT SCORED																																																																																				
	<p>ANSWER: As a Washington small business, Liberum does not anticipate sub-contracting for this effort. However, we continue to support and seek diverse sub-contracting partners.</p>																																																																																					
J	<p>Please describe any programs, policies or activities of your organization that support human health and environmental sustainability in your business practices. If a program, policy or activity is specifically applicable to this Contract, please indicate so.</p>	NOT SCORED																																																																																				

Bidder Name _____

	<p>ANSWER: Liberum is committed to providing a healthy and supportive work environment for our employees. We offer a variety of benefits and programs that support employee health and well-being, such as: 1. Health insurance: We offer comprehensive health insurance coverage to all of our employees. 2. Wellness programs: We offer a variety of wellness programs to our employees, such as 24 health care hotline, health screenings, and nutrition counseling. 3. Employee assistance program: We offer an employee assistance program to our employees and their families to provide confidential support for personal and professional issues. Liberum is also committed to supporting the health of the communities in which we operate. We do this by: 1. Partnering with non-profit organizations: We partner with non-profit organizations that are working to improve the health of the community. For example, members of our team partner with local food banks to provide food to people in need. 2. Sponsoring community events: We sponsor community events that promote health and wellness at disadvantaged middle and high schools. 3. Volunteering our time: Our employees volunteer their time to support a variety of health-related causes in the community. Liberum is committed to reducing our environmental impact. We have implemented a number of programs and policies to that effect, such as: 1. Recycling and composting: We have a comprehensive recycling and composting program in place to reduce our waste stream. 2. Sustainable transportation: Nearly all of our team members work remotely and are encouraged to choose environmentally efficient transportation options when commuting to the agency place of business. Specific Liberum programs, policies, or activities that are applicable to this Contract: 1. Liberum's leadership and development training programs can help DDS leaders to develop the skills and knowledge they need to create a healthy and supportive work environment for their employees. 2. Liberum's strategic planning services can help DDS to develop strategic plans that are aligned with the organization's mission and values, and that support the health and well-being of the community. 3. Liberum's organizational consulting services can help DDS improve its organizational structure and processes, which can lead to improved efficiency and effectiveness. In addition to the above, Liberum is also committed to providing culturally competent and trauma-informed services. We understand the importance of providing services that are tailored to the needs of diverse populations and that take into account the impact of trauma on people's lives. Liberum is a highly qualified and experienced firm with a proven track record of success in providing strategic planning initiatives, leadership and development training, and organizational consulting services. We are committed to providing high-quality services to DDS that will help the organization to achieve its mission and improve the lives of people in Washington state.</p>	
2	BIDDER EO 18-03 CERTIFICATION	MAXIMUM TOTAL POINTS
EO	<p>Are your employees required to sign, as a condition of employment, a mandatory individual arbitration clause and/or a class or collective action waiver?</p> <p>Please Note: Points for this question will be awarded to bidders who respond that they do not require these clauses and waivers. If you certify here that your employees are NOT required to sign these clauses and waivers as a condition of</p>	5

Bidder Name _____

	employment, and you are the successful Bidder, a term will be added to your Contract certifying this response and requiring notification to DSHS if you later require your employees to agree to these clauses or waivers during the term of the Contract.	
	ANSWER: No	Click or tap here to enter text.
3	BIDDER CERTIFICATION – WASHINGTON SMALL BUSINESS	MAXIMUM TOTAL POINTS
	<p>Are you a Washington Small Business as defined under RCW 39.26.010?</p> <p>According to Chapter 39.26.010 RCW, to qualify as a Washington Small Business, Bidder must meet three requirements:</p> <ul style="list-style-type: none"> a. <i>Location.</i> Bidder’s principal office/place of business must be located in and identified as being in the State of Washington. A principal office or principal place of business is a firm’s headquarters where business decisions are made and the location for the firm’s books and records as well as the firm’s senior management personnel. b. <i>Size.</i> Bidder must be owned and operated independently from all other businesses and have either: (a) fifty (50) or fewer employees; or (b) gross revenue of less than seven million dollars (\$7,000,000) annually as reported on Bidder’s federal income tax return or its return filed with the Washington State Department of Revenue over the previous three consecutive years. c. <i>WEBS Certification.</i> Bidder must have certified its Washington Small Business status in Washington’s Electronic Business Solution (WEBS). 	5
	ANSWER: Yes, Liberum is a Washington Small Business.	Click or tap here to enter text.
4	BIDDER CERTIFICATION – CERTIFIED WASHINGTON VETERAN-OWNED BUSINESS	MAXIMUM TOTAL POINTS
	<p>Are you a Certified Washington Veteran-Owned Business as defined under RCW 43.60A.190?</p> <p>According to Chapter 43.60A.190 RCW, to qualify as a Certified Washington Veteran-Owned Business, Bidder must meet four requirements:</p> <ul style="list-style-type: none"> a. <i>51% Ownership.</i> Bidder must be at least fifty-one percent (51%) owned and controlled by: <ul style="list-style-type: none"> 1. A veteran is defined as every person who at the time he or she seeks certification 	5

	<p><i>has received a discharge with an honorable characterization or received a discharge for medical reasons with an honorable record, where applicable, and who has served in at least one of the capacities listed in RCW 41.04.007;</i></p> <ol style="list-style-type: none"> <i>2. A person who is in receipt of disability compensation or pension from the Department of Veteran’s Affairs; or</i> <i>3. An active or reserve member in any branch of the armed forces of the United States, including the national guard, coast guard, and armed forces reserves.</i> <p><i>b. Washington Incorporation/Location. Bidder must be <u>either</u> an entity that is incorporated in the state of Washington as a Washington domestic corporation <u>or, if not incorporated</u>, an entity whose principal place of business is located within the State of Washington.</i></p> <p><i>c. WEBS Certification. Bidder must have certified its Veteran-Owned business status in Washington’s Electronic Business Solution (WEBS).</i></p> <p><i>d. WDVA Certification. Bidder must have provided certification documentation to the Washington Department of Veterans’ Affairs (WDVA) and be certified by WDVA and listed as such on WDVA’s website (WDVA – Veteran-Owned Businesses).</i></p>	
	ANSWER: No	Click or tap here to enter text.

Bidder Name _____

5	BIDDER QUALIFICATIONS AND EXPERIENCE (MANAGEMENT RESPONSE)	MAXIMUM TOTAL POINTS
	DESIRED EXPERIENCE AND QUALIFICATIONS	
A	Describe the experiences, skills and qualifications your organization possesses that are relevant to: Strategic planning, including work with MVVs, goals, objectives, action plans, and key performance indicators.	50
	<p>ANSWER: 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 (https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide), 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 organization possesses that are relevant to: Leadership training and development from executive management level to front line supervisors.	50
	<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,</p>	

Bidder Name _____

	<p>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>	
<p>C</p>	<p>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.</p>	<p>50</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 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</p>	

Bidder Name _____

	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.	
D	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.	35
	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 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
	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 proposed timeline and training schedule with any recommended adjustments to timing, content, and sequence of events.	45
	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	

Bidder Name _____

	<p>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.</p>	
G	<p>Please provide a sample strategic plan or similar that has been developed within the past 24 months.</p>	<p>30</p>
	<p>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: https://www.dshs.wa.gov/office-of-the-secretary/2023-2025-strategic-plan-guide. 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.</p>	
H	<p>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.</p>	<p>20</p>
	<p>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</p>	

Bidder Name _____

	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.	
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> <ul style="list-style-type: none"> (1) FFY 2024 – January 1, 2024 through September 20, 2024 (2) FFY 2025 – October 1, 2024 through December 31, 2024 	20
	<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:</p> <ul style="list-style-type: none"> (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 <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>	

6	BUDGET AND REPORTING	MAXIMUM TOTAL POINTS
A	Complete Attachment F: Budget Response Template, detailing all costs to provide the services as outlined in this Competitive Solicitation, including the Sample Contract set forth on Attachment A. Please include the completed form as a separate document in your bid response.	20
	<p>Bidders are to complete the Attachment F: Budget Response Template spreadsheet and submit it in Excel format with your bid response. Your responses in Attachment F will be scored in this section of Attachment D: Bidder Response Form.</p> <p>ANSWER: Click or tap here to enter text.</p>	

Competitive Solicitation RFP # 2334-835
Bidder Name _____

Attachment D, Bidder Response Form

**Attachment E
Contractor Inclusion Plan**

Instructions

DSHS requires that bidder submit this inclusion plan template as part of their proposal. Once submitted, the Inclusion Plan template becomes part of the contract if awarded to the bidder. The Bidder shall also include an anticipated list of small and diverse subcontractors or vendors who may provide services on the project. Responses should reflect the Bidder's sincere efforts to include diverse small businesses. Businesses listed in the plan must be certified by OMWBE or DVA or registered in WEBS as a small business. If a company is not certified or registered but may be eligible for certification, the Bidder should encourage the company to become certified.

Inclusion goals are aspirational. No preference is given for inclusion plans or goals in the evaluation of bids. While no minimum level of OMWBE certified, Veteran Owned, or Washington Small Business participation will be required as a condition for receiving an award, the plan must include the actions the contractor will take to increase subcontracting opportunities for those business types.

DIVERSE BUSINESS INCLUSION PLAN

1. Do you anticipate using, or is your firm, a Washington State Certified Minority Business?
 YES NO

2. Do you anticipate using, or is your firm, a Washington State Certified Women's Business?
 YES NO

3. Do you anticipate using, or is your firm, a Washington State Certified Veteran Business?
 YES NO

4. Do you anticipate using, or is your firm, a Washington State Small Business?
 YES NO

5. If you answered No to all the questions above, please explain:

6. A description of your firm's planned efforts at outreach to the small and diverse business community:

As a Washington small business, Liberum is a diverse supplier and recognizes the value of diverse contracting and subcontracting. We continually use networking events, conferences, client referrals, and community outreach activities to identify other potential diverse suppliers.

7. A list of projects (5 max.) with diverse business participation in the last five (5) years:

Liberum, a Washington Small Business and diverse supplier, has not subcontracted for similar services in the past 5 years.

Subcontractor	Project	Year	Percentage

8. A description of how firm considers small business in the development of bid packages.

As a Washington small business, Liberum is a diverse supplier. While we did not need to seek other diverse suppliers to subcontract with to support this DDS opportunity, we regularly seek vendors with the capabilities to perform outstanding services for our clients, and are intentional about supporting other Washington small businesses, and women, minority, and veteran-owned businesses in our community.

9. Describe the actions you will take to increase subcontracting opportunities for those business types.

As a Washington small business, Liberum is a diverse supplier, and we pride ourselves on building and supporting a network of other diverse businesses in the community. We will continue our efforts to connect with and subcontract with diverse suppliers as needed, to deliver holistic and effective support to our clients.

10. Please indicate the number of people in your Diversity Inclusion team.

At Liberum, we expect all team members to participate in diversity, equity, inclusion, and belonging work.

If you answered Yes to any of questions one through four, please complete questions eleven through thirteen.

11. Please list the approximate percentage of work to be accomplished by each group in this contract:

11.1 Minority 0%

11.2 Women 0%

11.3 Veteran 0%

11.4 Small Business 100%

12. Please identify the person in your organization to manage/ lead your Diverse Inclusion Plan responsibility.

12.1 Name: Brent Carr

12.2 Phone: 425-999-4256 x201

12.3 E-Mail: bcarr@liberumnow.com

13. Please identify the list of potential diverse subcontractors

13.1 -----

13.2 -----

13.3 -----

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein.

Bidder's Signature:  _____

Title: Partner _____

Organization Name: Liberum, LLC. _____

Date: 11/15/23 _____

Place Signed (City, State): Snohomish, WA _____

ATTACHMENT F- BUDGET RESPONSE TEMPLATE

Timeframe for Budget

January 2024 - December 2024

Bidders Name:

Employee Salaries	% of FTE	Monthly Salary
Various Staff Assigned Based on Hours Allocated		\$ 16,250.00
Subtotal Employee Salaries	0%	
Employee Benefits	Rate	Monthly Costs
NA/ Included in Salary Cost		
Subtotal Employee Benefits		
Program Costs		Monthly Cost
Equipment and Technology		
Interpretation and Translation Services		
Various Presentation Materials		250
Subtotal Program Costs		

		Monthly Cost
Third Party Payment Subcontract		
Award Products (i.e. prepaid card, check, etc.)		
Program Administration		
Collateral Customization		
Other (specify) List below:		
Subtotal Third Party Payment		

Other Subcontracts Description and Justification of costs <i>(Please provide the detailed cost breakdown for each line item)</i>		Monthly Cost
Subtotal Other Subcontracts		
Administrative/Indirect Costs	Rate	
TOTAL		

<i>Amount Budgeted</i>	
\$	-
\$	-
\$	-
\$	-
\$	-
<i>Amount Budgeted</i>	
\$	198,000.00

ORGANIZATIONAL DEVELOPMENT PRACTICE DIRECTOR

Profile Summary

Organizational Development professional skilled at facilitating and supporting teams and leaders to build clarity, engagement, and strategy to improve organizational and leadership performance.

- Over 17 years of Leadership Development experience: creating training, materials, and learning plans for adult learners
- Over 20 years coaching and leading teams to implement best practices, prioritization, and effective decision-making
- 10 years of executive coaching and mediation experience: Marshall Goldsmith Stakeholder-Centered certified coach
- Expert facilitator adept at creating outcome-driven engagement for strategic planning, team building, issue resolution, and prioritization and action planning
- 8 years of experience creating learning plans and supporting program development for diversity, equity, inclusion, and belonging

Education

Western Washington University

1999-2003

Bachelor of Arts in Communication Sciences, Minors in Linguistics and Spanish

Work Experience

Senior Consultant, Liberum, LLC

2019-present

- 2023-present: Equity and Belonging Strategist for Washington State Department of Labor and Industries: supporting Chief Equity and Belonging Partner to create and launch program structure, develop learning plans and agency engagements, and measure success using Office of Equity DEI Competencies
- 2022-present: Expert-level Organizational Change Management Consultant and Executive Coach on WA Cares Fund Long Term Care Project. Supporting WA Cares project team with executive coaching, facilitation, communications, and mediation. Built comprehensive OCM strategy and plans based on readiness conducted across three partner agencies.
- 2022-2023: Consultant to City of Boise Idaho for Project and Portfolio Management Project, building OCM strategy and plans for engaging staff and increasing adoption of new Portfolio Management tool. Supported Project Director and Deputy Chief of Staff with executive coaching and strategy.
- 2022-2023: Consultant to City of Boise Idaho for Department of Finance and Administration 3.0 Project, coaching leaders and creating/delivering training on navigating change as leaders. Facilitated DFA Leadership Team development and team building. Led strategy for staff engagement.
- 2020-2022: Senior OCM Consultant for DSHS Division of Vocational Rehabilitation Business Management Modernization Project. Created comprehensive OCM strategy and plans for two-phased project based on readiness. Coached Project Director and executive leaders and created/delivered training on leading change. Built Change Champion network with representatives from across DVR, to inform communications, engagement, and strategy.
- 2019-2020: Senior OCM Consultant for Department of Ecology Ehub and Ehub 2 projects. Created comprehensive OCM strategy and plans for two-phased project based on readiness. Coached executive leaders and created/delivered training on leading change. Built Change Champion network with representatives from across ECY, to inform communications, engagement, and strategy.

ORGANIZATIONAL DEVELOPMENT PRACTICE DIRECTOR

Work Experience

OCM Administrator, Washington State Department of Children, Youth, and Families

2018-2019

- Established the Organizational Change Management (OCM) Office, in partnership with Organization Development Director, for new State agency to deliver OCM consultation and support for leadership, teams, and projects
- Leadership:
 - Delivered coaching, team building, and sponsorship consultation for Executive Leadership
 - Drafted communication plans and communications for Executive Leadership to announce changes to the agency
- Teams:
 - Developed and delivered OCM training, including making the case for OCM, the individual change process, supervisor/manager role in OCM, and sponsorship
 - Conducted team assessments and created training and development plans to address identified gaps
- Projects:
 - Served as OCM practitioner and consultant on large-scale projects, process-changes, and initiatives throughout organization
 - Coached and mentored OCM practitioners on small to mid-scale projects
 - Coordinated inaugural Washington State Diversity, Equity, and Inclusion Summit with 500+ attendees in January, 2019

Employee Development Manager, Washington State Department of Licensing

2015-2018

Developed, implemented, and managed programs and projects with agency-wide impact on engagement, culture, and performance: Programs:

- Established structure and managed operations of agency Employee Development Program, serving over 1350 employees with required and developmental training portfolios
- Established and managed mentoring program
- Created tuition assistance program, providing over \$100,000 to employees for continued education in first year
- Developed and delivered 360° feedback program and training Projects:
- Provided OCM support for agency-wide diversity, equity, and inclusion (DEI) work, including communication and training plans, and drafting executive communications
- Coordinated and managed DEI training and conference for agency leaders and employees
- Provided OCM support for agency information management efforts (data security, secure email, data governance), including communication, training plans, and executive communications
- Coordinated annual leadership conferences, training 300+ attendees
- Developing training tracks and career pathing for agency employees at all levels

Management Analyst, Washington State Department of Licensing

2014-2015

- Supported agency Human Resources (HR) Director and led divisional efforts to implement Lean methodologies and tools in HR consultation, recruitment, training, and meeting management
- Managed 2-day leadership conference for 280+ attendees
- Agency co-chair for Combined Fund Drive, exceeding campaign goals for employee contributions and increasing % employee involvement
- Worked with Lean Program team to build foundational structure and agency awareness of Lean
- Developed, implemented, and maintained Lean Participation Tracking Tool
- Created branding, outreach materials, and online resources for
- Lean Program and Planning and Performance, including Lean Results Posters and Results DOL information briefs
- Facilitated Lean projects as Lean Six Sigma Green Belt

SENIOR CONSULTANT

Profile Summary

Organizational Development professional with holistic background supporting individuals and organizations:

- Over 16 years of Leadership Development experience: creating training, materials, and learning plans for adult learners
- Over 3 years of strategic planning experience, with background in managing/administering action plans and key performance indicators
- Expert facilitator adept at creating outcome-driven engagement for strategic planning, team building, issue resolution, and prioritization and action planning

Education

University of Phoenix

Bachelor of Science in Business: Public Administration

Work Experience

Senior Consultant, Liberum, LLC

2022-present

- 2022-present: Senior OCM Consultant for DSHS Division of Vocational Rehabilitation Business Management Modernization Project.
- Designing and implementing effective training programs, fostering a positive and adaptive organizational culture, and coaching individuals and teams through change process.
- Facilitated DVR Leadership Team through development of new DVR strategic vision and associated action plan.

HR Strategic Project Administrator, Department of Social and Health Services

2019-2022

- Managed and administered divisional project portfolio/best practices, key performance indicators, strategic plan, and divisional action plans as member of HR Executive Leadership Team
- Served as Project Manager between DSHS administrations for HR-related projects and collaborative efforts across DSHS
- Consulted and coached Executive Leadership Team and staff through crucial conversations to achieve a win for all parties and create buy in new or changing processes.

Organizational Change Manager, Department of Social and Health Services

2017-2019

- Developed and implemented the first enterprise-wide Organizational Change Management (OCM) program for a human service organization of 16,000+ people.
- Administered Prosci Change Management certifications and built a robust, sustainable change management foundation that was grounded in person-centered business practices.
- Created enterprise-wide OCM Community of Practice, to help disseminate information, gather feedback on agency-wide initiatives and share best practices.

Performance Transformation Manager, Department of Social and Health Services

2015-2017

- Led the implementation and delivery of the DSHS Performance Transformation training program that focused on leadership and organizational development for all DSHS managers and supervisors across Washington State.
- Role included performing executive coaching, mentoring, and consulting to support leader education.

Information Technology Specialist, Department of Social and Health Services

2007-2014

- Served as a lead and program developer in DSHS's mentoring, enterprise-wide digital records system; the Management Operations Document Imaging System (MODIS).
- Created and enacted service level agreements between contracted divisions and offices within DSHS, as well as produced, implemented, and delivered training programs for customers

CONSULTANT, STRATEGIC PLANNING EXPERT

Profile Summary

- Over 8 years years of strategic planning experience, including development and rollout of goals, objectives, action plans, and KPIs. Facilitated DSHS 2019-2021, 2021-2023 and 2023-2025 agency Strategic Plan and its respective strategic planning cycle.
- Lean Six Sigma Black Belt adept at coaching and facilitating teams and individuals to improve systems and processes
- Expert facilitator adept at creating outcome-driven engagement for strategic planning, issue resolution, prioritization and action planning
- Certified in organizational Succession Planning

Education

University of Puget Sound

Bachelor of Arts in Psychology, Minor in Politics and Government

Work Experience

Senior OCM Consultant, Liberum, LLC

2023-present

- 2022-present: OCM Consultant for Liquor and Cannabis Board Project. Designing and implementing effective training programs, fostering a positive and adaptive organizational culture, and coaching individuals and teams through change process. Facilitated DVR Leadership Team through development of new DVR strategic vision and associated action plan.

Planning and Labor Management Manager, Department of Social and Health Services

2022-2023

- Monitored strategic implementation by creating, implementing, managing and reinforcing a tailored plan that works in sync with goals and outcomes.
- Researched, analyzed, and provided expert advice to the agency's top leaders through the use of communication plans and leadership coaching.
- Designed, develop and implement assessments, plans, communications, trainings and engagement activities.
- Implemented new improvements based on staff and client feedback.
- Facilitated workgroups involving both internal and external customers and impacted groups.

Strategy and Planning Manager, Department of Social and Health Services

2017-2022

- Monitored strategic implementation by creating, implementing, managing and reinforcing a tailored plan that works in sync with goals and outcomes.
- Researched, analyzed, and provided expert advice to the agency's top leaders through the use of communication plans and leadership coaching.
- Built relationships with leadership, team members and stakeholders.
- Designed, developed and implemented assessments, plans, communications, trainings and engagement activities.
- Synthesized information into clear, concise messages for detailed reports and executive summaries.
- Implemented new improvements based on staff and client feedback.
- Facilitated workgroups, cross functional improvement projects, and scoped improvement opportunities involving both internal and external customers and stakeholders.
- Articulated, present and report progress and metrics.
- Facilitated change management trainings to all levels of staff.

CONSULTANT, STRATEGIC PLANNING EXPERT

Work Experience

Performance Management Analyst 5, Department of Social and Health Services

2015-2017

- Monitored strategic implementation by creating, implementing, managing and reinforcing a tailored plan that works in sync with goals and outcomes.
- Researched, analyzed, and provided expert advice to the agency's top leaders through the use of communication plans and leadership coaching.
- Built relationships with leadership, team members and stakeholders.
- Designed, developed and implemented assessments, plans, communications, trainings and engagement activities.
- Synthesized information into clear, concise messages for detailed reports and executive summaries.
- Implemented new improvements based on staff and client feedback.
- Articulated, present and report progress and metrics. .
- Facilitated workgroups, cross functional improvement projects, and scoped improvement opportunities involving both internal and external customers and stakeholders.
- Developed and organized leadership development growth opportunities for staff.

Developmental Job Assignment, Department of Social and Health Services

2015

- Demonstrated use of various facilitation techniques.
- Provided assistance in the development of unit's strategic planning and metrics.
- Provided facilitation to embrace a Lean culture and improve quality and service.
- Broadened knowledge on organizational development, change management/systems thinking, leadership development, employee motivation, organizational psychology, risk management, and SharePoint.

Loss Prevention Consultant, Department of Social and Health Services

2014-2015

- Collaborated and consulted directly both verbally and in writing with internal and external contacts.
- Visited facility sites and provided just in time trainings.
- Participated and provided assistance in the development of unit's strategic planning and metrics.
- Facilitated events and trainings to embrace a Lean culture and improve quality and service.
- Synthesized information into clear, concise messages for detailed reports and executive summaries.
- Analyzed and interpreted policies, law, and rules.

PROJECT MANAGEMENT PRACTICE DIRECTOR, EXPERT MEDIATOR

Profile Summary

- Over 10 years of successfully mediating various situations in project, program and operational settings.
- Over 15 years of experience as a Lead Project and Program Manager for enterprise, large-scale implementations, and infrastructure projects.
- Over 5 years of executing projects within Washington State Agencies. Expert in managing complex OCIO policies and working within the unique State environments.

Education

University of Chicago

Master of Arts, Anthropology

University of New Mexico

Bachelor of Arts, Anthropology

Work Experience

Senior Consultant and Practice Director, Liberum, LLC

2018-present

- Utilize mediation skills to ensure alignment among operational directors and project teams.
- Lead a team of project managers and oversee the execution of all projects managed by Liberum PM consultants, ensuring alignment with organizational goals and client expectations.
- Develop and implement project management best practices, methodologies, and standard operating procedures to enhance efficiency and project delivery.
- Collaborate with other senior leaders to define and execute strategic initiatives for the project management practice, resulting in greater unity and alignment.
- Provide mentorship and coaching to project managers, fostering a culture of continuous improvement and professional development.
- Successfully managed 2 large implementations with cross-functional teams at WSDOT, DOTtime and Land Mobile Radio implementations within budget and schedule. Currently upgrading the agency's core financial system and managing the remediation of downstream impacts as well as participating in the statewide implementation of Workday.

Program and Project Manager, Presbyterian Healthcare Services, Albuquerque, NM

2014-2018

- Led and managed multiple projects needed to enable a new business line within the Presbyterian umbrella.
- Collaborated with cross-functional teams to define program scope, objectives, and deliverables, ensuring alignment with organizational goals.
- Mediated between various stakeholders to align first on the definition of success and then the path to achieve.
- Developed and maintained program schedules, tracking milestones and critical paths to ensure on-time delivery.
- Conducted regular program reviews, identifying risks and implementing mitigation strategies to minimize disruptions.
- Successfully managed stakeholder relationships, ensuring clear communication and alignment of expectations.
- Managed IT Project Managers and operational project managers to ensure project milestones were achieved.
- Data & Analytics - Designed and implemented a new Enterprise Data Warehouse to support strategic data & analytics initiative.
- Implemented a Master Data Management solution for Provider data and upgraded the Customer Hub Design.
- Implemented workflow ETL processes through source systems to the MDM solution to the Enterprise Data Warehouse.

ORGANIZATIONAL DEVELOPMENT CONSULTANT

Profile Summary

- Over 5 years of experience specializing in leadership coaching, leadership and team development programs.
- Adjunct Instructor, Boise State University, utilizing leadership and behavioral psychology to teach adult learners how to motivate and develop others, manage conflict, and lead teams and individuals to reach their goals.
- Gallup certified CliftonStrengths Coach.
- Certified Intrinsic Coach
- Certified Workplace Culture Consultant
- Lean Six Sigma Green Belt

Education

Boise State University

Master of Science, Organizational Performance and Workplace Learning (in progress)

Boise State University

Bachelor of Business Administration, Marketing

Work Experience

Organizational Development Consultant, City of Boise, Idaho

2021-present

- Internal consultant for the City of Boise in the areas of operational transformation, organizational development and effectiveness, change management, performance improvement, and leadership and team development.
- Designed and transformed the Talent Acquisition team to follow industry best practices and improve processes, resulting in quicker time-to-fill, reduction in city-wide vacancies, and improved internal customer satisfaction
- Lead the transition of the Organizational Development team at the City of Boise from a training team to an internal performance consulting team

Training and Organizational Development Coordinator, City of Boise, Idaho

2018-2021

- Internal leadership and development coach, facilitator, and talent program manager
- Currently designing an organization-wide leadership development strategy and associated programming
- Designed and lead new leader development program, including training and individual coaching
- Assisted in developing, launching, and maintaining internally designed city-wide performance management program
- Facilitate the integration of organizational health assessments, performance management data, and associated action items into organizational strategy
- Facilitate individual and team development programs
- Support department directors in working towards goals related to improving the culture of their departments

Adjunct Instructor, Boise State University

2020-present

- Designed and instruct LEAD 494, Team Leadership in Action
- Using theories of leadership and behavioral psychology, teach students how to motivate and develop others, manage conflict, and lead teams and individuals to reach their goals

ORGANIZATIONAL DEVELOPMENT CONSULTANT

Work Experience

HR Business Partner, Title Resource Group

2017-2018

- Provided coaching, consultation, and partnership to leaders and employees
- Assessed leadership and team competency gaps
- Designed and facilitated ongoing training and coaching for business leaders on topics including team development, performance management, and succession planning
- Redesigned and facilitated programs including onboarding, new hire orientation, and team leader training
- Operationalized post-acquisition process change and program integration including, but not limited to, performance management/improvement processes, termination and onboarding processes
- Conducted internal SWOT analysis and facilitated workshops at annual leadership “Strategic Planning” event
- Led all HR functions for both business units, consisting of 300+ employees and covering two states

Recruiter and Intern Program Coordinator, Saint Alphonsus Health System

2016-2017

- High volume, full-cycle recruitment for roles across the health system, ranging from senior leadership to entry-level
- Coached leaders on effective interviewing and talent selection
- Revised recruitment team engagement action plans and developed tools to increase the frequency and effectiveness of individual development meetings
- Created and launched the Saint Alphonsus Summer Internship Program (college internships) for professional-level roles
- Designed and developed materials for the internship program including, but not limited to, intern evaluations, intern and mentor expectation guides

EMPLOYEE CHANGE TOOLKIT



HOW TO NAVIGATE TIMES OF CHANGE WITH CALM, CLARITY, AND A SENSE OF CONTROL

Well said...

"Resilience is based on compassion for ourselves as well as compassion for others."
-Sharon Salzberg

subtle reminder: be good to yourself

WHAT ABOUT WAVES?

Specific to WAVES, here's some resources to peruse...

- [BMMP Landing Page](#)
- [Newsletter Archives](#)
- [Manager and Supervisor Toolkit](#)
- [Executive Toolkit](#)
- System Demos (coming soon!)
- [Project Team Structure](#)
- How to get help: dvrbmmp@dshs.wa.gov

1: Start with self.

It all starts with self-awareness and understanding where you stand relative to the change. Complete the Self-Assessment below to get an idea of how you really feel about the change, and where you might be stuck (we all get stuck, btw... that's normal):

- [Self-Assessment](#)

Use the second page of the Self-Assessment to walk through next steps.

2: Resistance is normal (not futile).

The brain's first reaction to changing circumstances comes from fear... am I safe? What's happening and why, and is this a threat? It's how we're wired.

This quick video breaks it down:

- [Hilary Scarlett: Why do our brains find change difficult? \(2:11\)](#)

3: Ok, now what?

Identify what you can control v. what you can't. Know your barriers (thanks to the Self-Assessment!), and go get the information and support you need to move forward. It's crucial that you advocate for yourself... don't wait for the information/resources to come to you, seek it out.

- [How to ask for help in the workplace](#) (Harvard Business Review)

And remember, self-care is a must, especially in times of change. Here's some resources to help:

- [Active Minds](#)
- [Soul Pancake](#) (if you need a laugh)

EXECUTIVE CHANGE TOOLKIT



HOW TO LEAD IN TIMES OF CHANGE WITH CALM, CLARITY, AND PURPOSE

Well said...

"Few things are more important during a change event than communication from leaders who can paint a clear and confidence-inspiring vision of the future."
-Sarah Clayton

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2: What people need from you.

Now that you know how you're feeling about the change, what is your role as a leader, and what do your folks need from you?

The why.

The executive's role is all about making the case for the change and tying it back to the organization's larger strategy and purpose. Here's a TED Talk to bring you into that "golden circle":

- [Simon Sinek: How Great Leaders Inspire Action \(17:47\)](#)

3: Memorize your script, and be transparent.

Effectively communicating the larger "why" behind the change is your job. It orients people to the vision of the agency and how this particular change feeds into that vision. Here's a handy tool for telling that story:

- [Telling the Story of Change](#)

Once you have your change story identified, share it in the right places, with the right audiences. Use a communication plan to organize your approach and messaging:

- [Communication Plan Tool](#)

LEADING THROUGH CHANGE

JANUARY 2022 REGION 1 LEADERSHIP MEETING

Samantha Trotter, OCM on BMMP



HELLO HI HOW ARE YA

NICE TO MEET YOU

Who I am, and the format of our session today

A bit of a project update, your role in change, and asking how I can best support you



PROJECT UPDATE

Key Milestones



Jan - Mar

Finishing up Sprints

Props to Pablo!



April

User Acceptance
Testing (UAT)



May

System Adjustments

Training Prep



June

Training!



July

Go-Live 7/1/2022!

Ongoing Support
for End Users

TESTERS

Identified last year for User Acceptance Testing (UAT)

Testers	Testing Category
Don Redford, Thavy Mom-Hing, Mishana Williams, Clarisa Braulick, Patricia Mundy, Dee Quintanilla, Bonnie Vintin, Monica Valencia, Leilani Kittel, Celia Wren, Joan Lopez-Stuit, Debbie Maxell, Val Davis, Deona Koberstein, Lesa Dunphy, Lauren Peterson	VR Testers

Have feedback or some folks to add?
samantha.trotter@dshs.wa.gov

OK, NOW WHAT?

Let's talk a bit about what your role is during times of change.

You're the make it or break it group in the organization... no pressure. 😊



Hello CLARC

1.COMMUNICATE

Answer why, why now, what the risks are of not changing, and the impacts to us.

2.LIAISON

Engage the project team to get and give information, especially results and feedback.

3.ADVOCATE






Show your commitment to the change (walk the talk).

4.RESISTANCE MANAGER

Identify and address the root causes of resistance.

5.COACH

Support your direct reports through their ADKAR process.

	A	D	K	A	R
 Communicator	Answer why, why now, what if, my impact				
 Liaison					Results and feedback
 Advocate		Demonstrate commitment			
 Resistance Manager		Identify and address root causes			Celebrate and sustain
 Coach			Support "know how"	Support execution	



HOW GOES IT, WHAT DO YOU NEED?

EXISTING RESOURCES

- BMMP inbox:
dvrbmmp@dshs.wa.gov
- BMMP newsletter
- Manager/Supervisor Toolkit
- Me!
samantha.trotter@dshs.wa.gov



MANAGER & SUPERVISOR CHANGE TOOLKIT



HOW TO LEAD IN TIMES OF CHANGE WITH CALM, CLARITY, AND TEAM CAMERADERIE

Well said...

"Don't manage - **lead** change before you have to."
-Jack Welch

proactive, not reactive... (you got this)

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- [Self-Assessment](#)

2: Find your squad.

Managers and supervisors are in the middle of it all - especially organizationally. You're taking the vision of executive leaders and helping to translate and implement it through the folks doing the day-to-day work. Find support from other positive and impactful managers and supervisors to help navigate resistance and create a path forward.

3: What about my team?

Once you know where you stand relative to the change, and are working through your own resistance, consider your team members. One-on-One meetings with direct reports are crucial, and can help you identify potential resistance, and supply the information folks need to adapt to the changing landscape.

- [One-on-One Template](#)

The Team Assessment follows the Self-Assessment model (ADKAR) and is a handy tool (with coaching prompts!) to prepare for conversations about change.

- [Team Assessment](#)

THE TOOLKIT!

Tailored to your role during times of change



NEED HELP?

**HAVE IDEAS FOR
SUPPORTING DVR
THROUGH THIS
CHANGE?**

COME FIND ME!

I MEAN IT

samantha.trotter@dshs.wa.gov

THANK YOU!

MANAGER & SUPERVISOR CHANGE TOOLKIT



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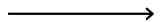


effective

COMMUNICATION

OCM HELP LAB

July 27, 2022





welcome and
INTRODUCTIONS

Name, Organization, Role

Today's AGENDA

1

THE IMPORTANCE OF
COMMUNICATING WELL

2

UNDERSTANDING YOUR
ORGANIZATION

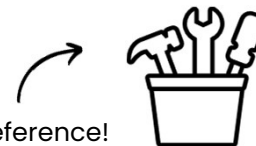
3

USING THE TOOLS (AND
MODIFYING AS NEEDED)

4

Q AND A
AND DEBRIEF

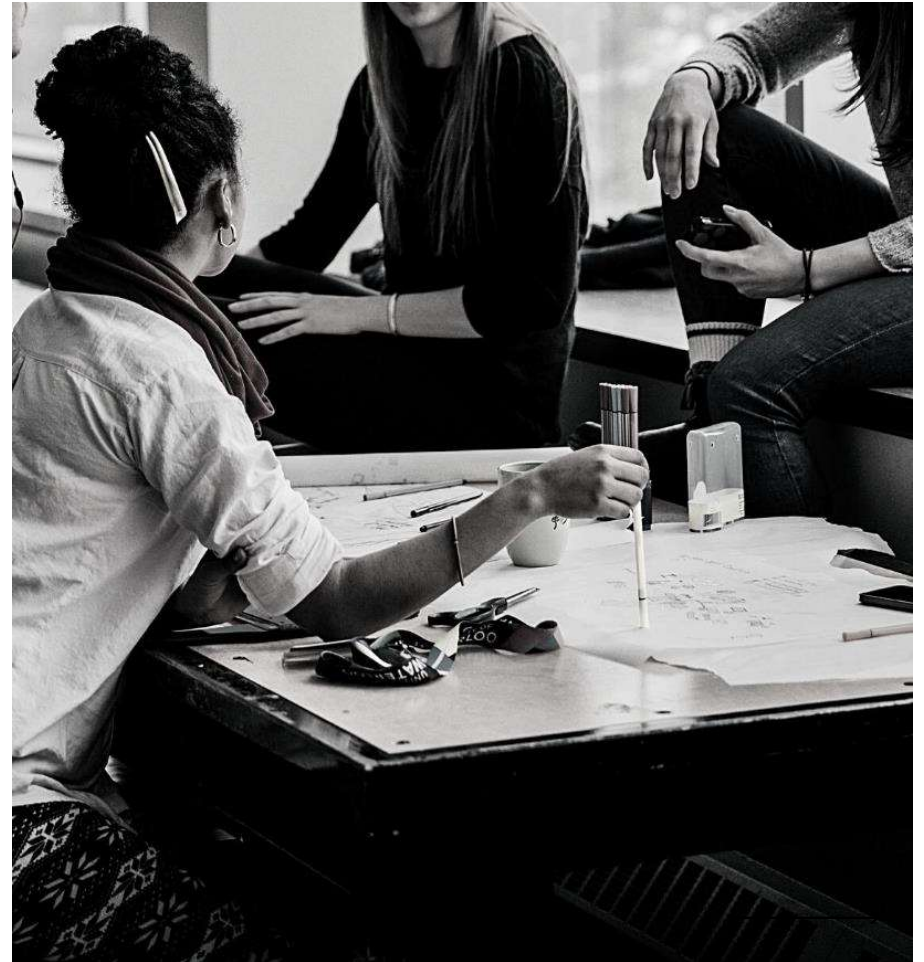
slides with this toolkit mean there's a resource in the handout for you to use/reference!



question
FOR YOU

why does effective communication matter?

THE IMPORTANCE OF
COMMUNICATING WELL



here's what
WE HEARD

"there's a lack of communication and training created and delivered for new applications"

"supervisors aren't sharing information with their teams"

"we struggle to come up with creative ways to communicate to stakeholders"



what Liberman BELIEVES

communication is *the* element that builds (or breaks!) trust for people experiencing change

in the absence of communication, the audience skews negative (thanks, human brain)

inclusivity and transparency are required (know all your audiences and be honest, especially when it is uncomfortable)

"The single biggest problem with communication is the illusion that it has taken place." -George Bernard Shaw

ok, what about
YOUR ENVIRONMENT?

consider your current state

the culture you're in will determine what methods and styles of communication will work best

add a dash of what you wish it could be (improve on, and demonstrate better ways of sharing information)



CASE STUDY: DEPT OF LICENSING

the project:

Website Improvements Project is the agency's effort to modernize their internal and external-facing (public) web content

the details:

- go-live is June 2023
- human-centered design approach
- content will be pulled from all across the organization
- so far, buy-in is strong at the leadership level, and decreases farther down the org



CASE STUDY: DEPT OF LICENSING

first:

ask the right questions, and don't just ask leadership or the project team

- why are we doing this project? what's the desired outcome?
- does this tie into agency vision/mission/values?
- how/when do people want to receive information about the project?
- what are the excited about/worried about relative to this change?
- what communication channels exist already, and are they working?

second:

align with existing communications people, and clarify roles

third:

find a project "voice" that is professional, engaging, and please for sake of all your audiences, not boring (be human, be friendly, be real)



digging into the **TOOLS**

once foundational work is done to understand the change and the organization, how do you DO communications?

the path will be pretty similar across changes, even if the content and methods vary



USING THE TOOLS (AND
MODIFYING AS NEEDED)

key messages **BY PHASE**



PLANT THE
SEED



COMING
SOON



PROVIDE
UPDATES



ARE YOU
READY?



ANNOUNCE
LAUNCH



WE ARE
LIVE!



LOOK IT'S
GREAT



LET'S
CELEBRATE



USING THE TOOLS (AND
MODIFYING AS NEEDED)

build out the PLAN



Audiences

Audiences have been broken down into two main groups: primary and secondary audiences. Primary audiences (also known as the target audiences) are those most personally affected by the project and associated changes within the organization. Secondary audiences include groups that are indirectly and/or minimally affected by associated changes.



Communication Activities

Start Date	Frequency	Event/Tool	Channel/ Vehicle	Purpose	Audience	Author	Sender
August 2019	Ongoing as needed	Sponsor Intro. Message	Video; then email and SharePoint	Serves as project launch initial communication and equips managers, supervisor, and staff to know what to expect in the next 4 months.	CI Staff CI & DOC Leadership	D365 PM/OCM Team & CI Leadership	Change Sponsor
August 2019	Ongoing	SharePoint Information page	D365 Learning Portal (Intranet)	Serves as public-facing information hub/repository for general D365 project information, tools, and resources	CI Staff CI & DOC Leadership Other Stakeholders	D365 PM/OCM Team	N/A
November 2019	Quarterly	Newsletter	Email & Post to SharePoint	Provide quarterly updates on D365 project and associated activities.	CI Staff CI & DOC Leadership Other Stakeholders	D365 PM/OCM Team	Change Sponsor
August 2019	Ongoing as needed	At-A-Glance Fact Sheets (Sneak Peeks)	D365 Info Page (Intranet); Email	Provide key facts about D365 and people/organizational impacts.	CI Staff CI & DOC Leadership Other Stakeholders	D365 PM/OCM Team	Project Sponsor
January 2020	Once with all groups as needed thereafter	D365 101	Group Meeting/Presentation/Web Ex	Develop a shared understanding and awareness of D365 project (purpose/business reasons for change, particulars about the project and potential impacts to day-to-day work)	CI Staff CI & DOC Leadership Other Stakeholders	D365 PM/OCM Team	CI Leadership PMT/OCM
Begin at Kick Off	Monthly	Sponsor Message	Email, CI Intranet	Engage staff, reinforce key messages, and recognize accomplishments	CI Staff CI & DOC Leadership	D365 PM/OCM Team	Project Sponsor
Begin at Kick Off	Monthly	Discussion Board	CI-Intranet	Collect feedback on relevant questions; tie to newsletter or Sponsor Email	CI Staff CI & DOC Leadership PM/OCM Teams	D365 PM/OCM Team	Internal PM
Begin Feb 2020	Bi-Monthly	CI Management Team Update	Group Meeting	Provide updates on D365 project work and associated impacts to staff; collect manager input on project direction and associated OCM activities.	CI Managers	D365 PM/OCM Team	D365 OCM Team
TBD	Ongoing as needed	Leader Talking Points	Email; Intranet	Prepare managers to talk with their teams about D365 project and impacts to day-to-day activities, job roles, processes, etc.	CI Managers & Supervisors	D365 PM/OCM Team	CI Leadership PMT/OCM
As Needed	Once with impacted staff w/follow-up as needed	Concrete Business process changes	Workshop; 1 page artifact by role/group	Document for staff the specific changes to their duties (e.g., a "Start/Stop/Continue" 1 pager/job aide by role/group)	All	D365 PM/OCM Team (with input)	CI Leadership
At Kick Off	Ongoing	Staff Feedback	Focus Group; Survey	Collect anonymous feedback on change efforts; measure adoption and usage.	All	D365 OCM Team	N/A

**Additionally, communication will be synchronized

USING THE TOOLS (AND MODIFYING AS NEEDED)

make it quick and
REPEATABLE

Project Transition Communications

Contents

Date Meetings: Facility Sponsor Check in & Date Steering Committee 1
Date Email: Facility Leadership (send after Steering Committee Notified)..... 1
Date Email: Phase Out (send after Steering Committee notified) 2
Date Email: Final Transition 4
Date Teams Message: Closing Chat for Teams Drop-in 5

Date Meetings: Facility Sponsor Check in & Date Steering Committee

Subject: Transition Away from facility to facility, Meeting Discussion

- Inform of Transition
- Path so far and what's remaining
- Email to All staff to be distributed last week of month.

Date Teams Message: Closing Chat for Teams Drop-in

****This Drop-In Chat Thread is now Closed****

YOU DID IT! **System** is live and the Project Team will be shifting focus to the next facility. But don't worry. You can still get **System** support by following the steps below.

1. Ask your supervisor if you have questions about **System**
2. If your supervisor doesn't know the answer, they can work with the **facility** Experts:
 - a. **Names**
3. If the **facility** Experts aren't sure of how to proceed, they will contact the project team at **email address**. [\(hyperlink\)](#)

Thank you,
The **System** Project Team



a quick
NOTE

consider the "perceived sender", and use wisely

know who will reinforce and strengthen the message, and who could disengage (street cred matters)



USING THE TOOLS (AND
MODIFYING AS NEEDED)

make it easy
TO SHARE



KNOW, DO, SHARE, REPORT

July 2022



KNOW

- Train the Trainer sessions for Wave 1 complete!
 - Additional Wave 2 Trainer opportunities are still available
- D365 Portal expanded: Wave 1 Training Curriculum and resources posted; Wave 2 live any day. Check it out here: [D365 Learning Portal](#)
- Power User Study Groups activated late this month, with hands on process navigation in D365
- Finance is now scheduled for an August/Sept go-live
- Daily D365 Drop In Sessions coming in August!



DO

- Review the Wave 2 (Core CI Supply Chain and Manufacturing Operations) Training Curriculum
- Contact OCM Team if you want to become a D365 Trainer



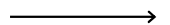
SHARE

- Share the Project Sharepoint Site & Change Toolkit links with your teams
 - [Project Homepage](#)
 - [Change Toolkits](#)



REPORT

- Report questions from you team, concerns or identified resistance to the OCM Team @ DOCERPUupgradeProject@DOC1.WA.GOV



USING THE TOOLS (AND
MODIFYING AS NEEDED)

Q and A DEBRIEF

what questions do you have?

specific comms troubles you want us to help solve?

(we love this stuff and are happy to help)

Q AND A
AND DEBRIEF



hey, was this
HELPFUL?

using the chat, pick one of these prompts and finish the sentence...



I LIKED...



I LEARNED...



I WISH...



I WONDER...



I PLAN TO...



Q AND A
AND DEBRIEF



Let's work
TOGETHER

Lauri Valenta: lvalenta@liberumnow.com

Samantha Trotter: strotter@liberumnow.com

Jen Renhard: jrenhard@liberumnow.com

info@liberumnow.com

THE FUNDAMENTALS OF
Organizational
CHANGE MANAGEMENT

Becoming an Agent of Change

Jessica Armstrong,
DVR BMMP OCM Lead & Senior OCM Consultant



Welcome

THANK YOU FOR YOUR TIME!

HOUSEKEEPING & NORMS

Connect

Use the chat and reactions to engage and connect. Ask questions along the way!

Your Voice

We want to hear from your expertise, let's all share. So much knowledge in the room! Video if you can 😊

Safe Space

Focus on creating a safe space for all to share. 'Vegas rule' please.

Have Fun & Take Action

Walk away with actionable steps & resources while having fun in this interactive and safe space.

OBJECTIVES *for today*

- **WHAT** is organizational change management (OCM)?
- **WHY** is OCM important?
- **HOW** do I respond in times of change?
- **WHAT** are some OCM tools I can apply?
- **WHERE** do I start?



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WHAT IS OCM?

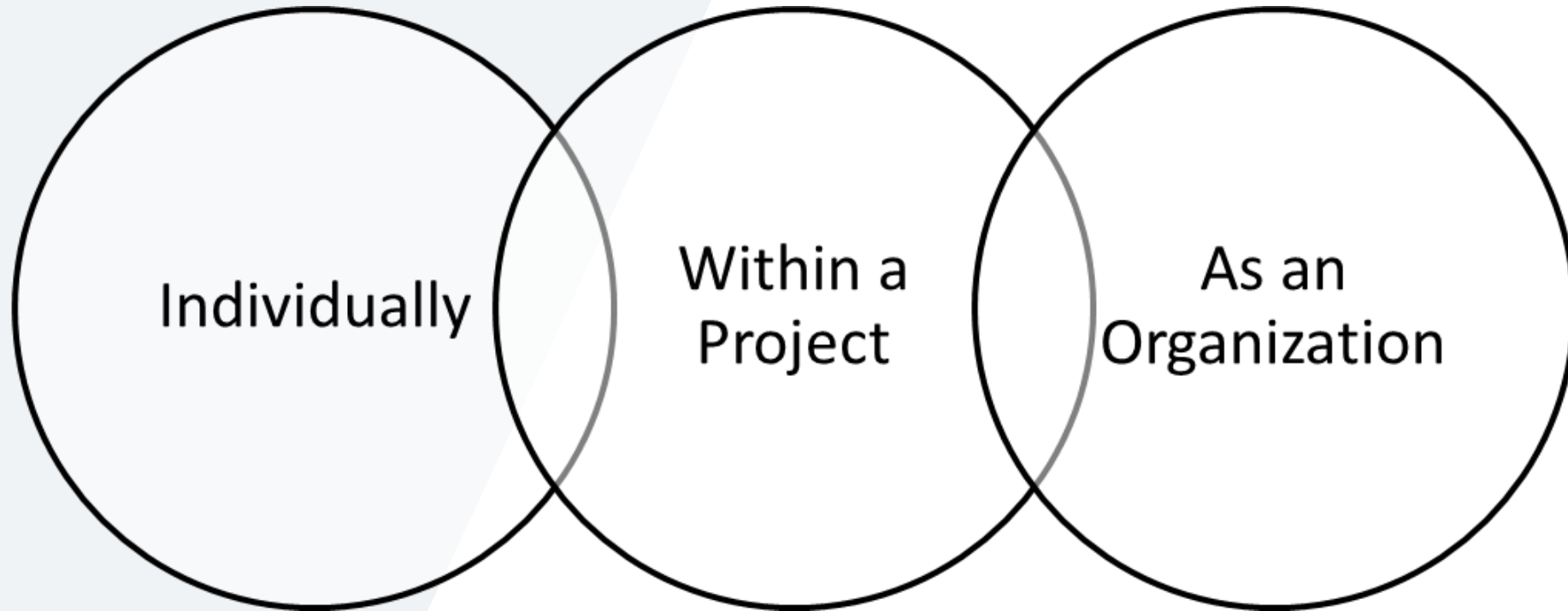
WHEN YOU HEAR THE TERM

'ORGANIZATIONAL CHANGE MANAGEMENT'

WHAT COMES TO MIND?

The process, tools and methodologies used to support the people side of change to achieve the desired results.

CHANGE HAPPENS ON MULTIPLE LEVELS



WHY IS OCM IMPORTANT?

WHY DO WE NEED TOOLS TO HELP US THROUGH CHANGE AT AN INDIVIDUAL LEVEL?

Human Nature

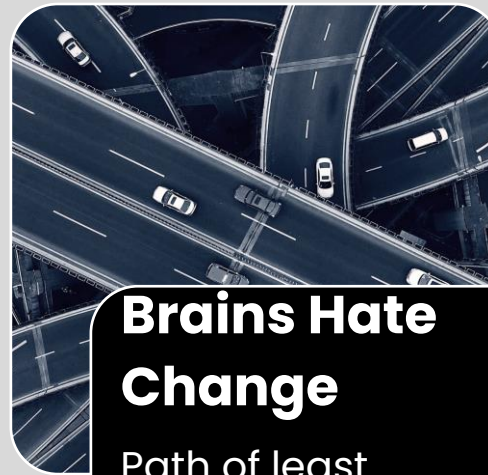
to resist change.

Think Readiness, not resistance!



Habits are Powerful

Mind maps limit what the brain 'sees.' Our brain is trained to favor familiarity.



Brains Hate Change

Path of least resistance; minimize energy use. Ever drive to a destination & don't remember? Autopilot!



Experiential Learning

You must 'see and feel' new ways of doing things, not just read about them.

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**“YOU CAN’T CHANGE WHAT’S
GOING ON AROUND YOU UNTIL
YOU START CHANGING WHAT’S
GOING ON WITHIN YOU.”**

-Unknown

BREAK

+
•
○

INDIVIDUAL REFLECTION ACTIVITY



1

Think about a successful change you have experienced.

2

Think about an unsuccessful change you have experienced.

3

Take 3 minutes to capture what you experienced during both change situations. **What made that situation successful and/or unsuccessful.**



ADDITIONAL QUESTIONS TO ANSWER

1. What made the successful change a reality?
 2. What made the unsuccessful change difficult?
 3. How would you describe your typical behavior when dealing with change? How does change impact you?
 4. What do you need during times of change? How to you acquire what you need?
-

**WHAT ARE THE CONSEQUENCES OF
NOT SUPPORTING INDIVIDUALS
DURING TIMES OF CHANGE?**



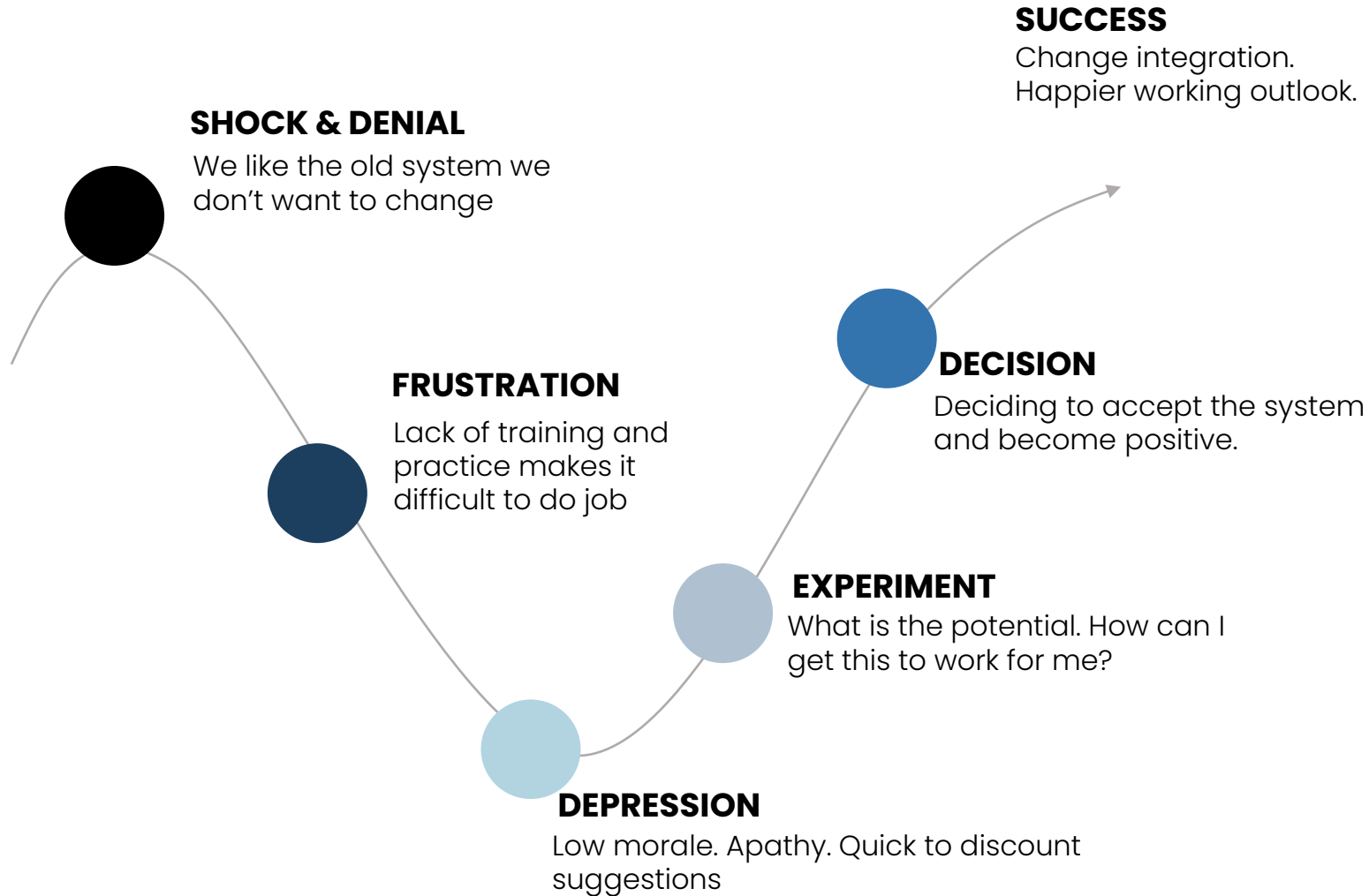


OCM

TOOLS & METHODOLOGIES

- ✓ Kuber-Ross Change Curve
- ✓ Kert Lewin's Three-Step Change Model
- ✓ ADKAR

WHERE AM I AND WHAT CAN I DO?



Strategy

Create Alignment

Maximize Communication

Spark Motivation

Develop Capability

Share Knowledge

WHAT DOES CHANGE MANAGEMENT LOOK LIKE IN THE REAL WORLD?



Unfreeze

Provide rationale for the change & create excitement through communications.

People tend to be frozen in their old ways of doing things, such as using a process, system, or tool.

Change management **unfreezes** those old behaviors and **transitions** people through awareness, training, and other forms of engagement to teach them the required new behaviors. Then it ensures those **new behaviors are “refrozen”** (*a.k.a. the new way of doing things*).



Change

Provide specific information, training and tools to help people experiment with the change. Listen & answer questions. Share benefits.



Refreeze

Implement new process/change, evaluate effectiveness and celebrate wins.

+
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**“IF NOTHING EVER
CHANGED, THERE WOULD BE
NO BUTTERFLIES.”**

-Unknown

BREAK

+
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Objectives

WHAT DO PEOPLE NEED TO BE READY?

Before we implement tactics to help navigate change, we first need to assess.

1. **Awareness** of the change
2. **Desire** to participate & support the change
3. **Knowledge** on how to change
4. **Ability** to demonstrate new skills & behaviors
5. **Reinforcement** to sustain the change.

ADKAR

Change

BEGINS WITH UNDERSTANDING THE WHY

- What is the nature of the change?
- Why is the change important/needed?
- What is the risk of not changing?
- 5-7 times

A

Awareness

Change

IS A PERSONAL CHOICE

- A personal decision to engage and support the change.
- The want to acquire the benefits.
- What's in it for me (WIIFM)?

D

Desire

Change

REQUIRES KNOWING HOW

- Knowing what is expected
- Understand how to execute what is expected
- Training on new system, tools, and processes
- Time to learn the new skill

K

Knowledge

Change
**REQUIRES THE ABILITY AND
ACTION TO DEMONSTRATE**

- Execute and perform accordingly
- Demonstrated capability to implement the change

A

Ability

Change

REINFORCED FOR SUSTAINABILITY

- Celebrating when change benefits are realized
- Recognition and rewards for staff
- Continued metrics & evaluation of the impact and benefits of the change

R

Reinforcement

WITHOUT...

- Employees ask same question over and over
 - Delays in implementation
 - Low moral and high turnover
 - Low productivity
 - Hoarding of information
- Avoid using the new process or system
 - Stress about mastery and skills
 - Negative impact on customers and service
 - Reduction in productivity
- Revert to old ways and processes
 - Lack of trust in strategic initiatives
 - Organization creates a history of poorly managed change

Awareness & Desire

Knowledge & Ability

Reinforcement

ADKAR IN ACTION

- 1. Complete the self-assessment** to help identify what you need/are experiencing during a particular change.
- 2. Identify where you have a 3 or below**, that is a potential barrier point.
- 3. Use the assessment questions** to help you identify what you need to move through the barrier point.
- Remember, it's all about **identifying where you are stuck** and getting yourself what you need to move forward.

Self-Assessment:

Am I Ready for Change?

Based on the Prosci® ADKAR® model

Complete the form below for a change you are experiencing using this scale:

- 1: Strongly disagree
- 2: Somewhat disagree
- 3: Neutral
- 4: Somewhat agree
- 5: Strongly agree
- NA: Not applicable

Briefly describe the change:

<i>Awareness</i>						
I understand the business reasons for this change	1	2	3	4	5	NA
The leadership's vision for this change has been clearly communicated	1	2	3	4	5	NA
I know where to go to find more information about this change	1	2	3	4	5	NA

<i>Desire</i>						
I look forward to participating in this change	1	2	3	4	5	NA
I am personally on board and will help make this change happen	1	2	3	4	5	NA
My colleagues support this change	1	2	3	4	5	NA

<i>Knowledge</i>						
I have the skills and ability to be successful through this change	1	2	3	4	5	NA
I believe I will get further training if needed to be successful in this change	1	2	3	4	5	NA
I can assist my team in successfully navigating this change	1	2	3	4	5	NA

<i>Ability</i>						
I am able to perform the new duties required by this change	1	2	3	4	5	NA
I have opportunities to get help and support if I need it	1	2	3	4	5	NA
I am able to support my teammates through this change	1	2	3	4	5	NA

<i>Reinforcement</i>						
Our organization is committed to this change, as am I	1	2	3	4	5	NA
I am recognized for learning and performing new job duties and processes	1	2	3	4	5	NA
I feel appreciated for helping make this change possible	1	2	3	4	5	NA

INDIVIDUAL CHANGE

If the gap is: **Actions:**

Awareness

- Discuss and explore the reasons and benefits for this change, both on the organizational level and on the individual level. Communicate the why, what, how, and when of the change (5-7 times).

Desire

- Address their inherent desire to change (which may stem from negative or positive consequences). The motivating factors have to be great enough to overcome the individual's personal threshold to resisting change. What's in it for me (WIIFM)?

Knowledge

- Avoid dwelling on reasons for change and motivating factors, as this could be discouraging to somebody already at this phase. What is needed is education and training for the skills and behaviors necessary to move forward.

Ability

- A least two steps are required. First, time is needed to develop new abilities and behaviors. Second, ongoing coaching and support is required—a one-time training event or education program may not be adequate. Consider outside coaching, support and/or mentoring from peers.

Reinforcement

- Investigate if the necessary elements are present to keep the person from reverting to old behaviors and/or processes. Address the incentives or consequences for not continuing to act in the new way. Reiterate the WIIFM.

PROJECT & ORGANIZATION

If the gap is: **Actions:**

Awareness

- Communications by senior leaders about the business reasons for change (why, risk of not changing, drivers of change)
- Face-to-face communications with immediate supervisors about how the change impacts them directly

Desire

- Look for pockets of resistance and identify the root cause
- Manage the resistance through strategies:
 - Listen & understand objections
 - Focus on the “What” and Let Go of the “How”
 - Remove barriers
 - Provide simple, clear choices & consequences
 - Create hope
 - Show the benefits in a real tangible way
 - Convert the strongest dissenters

Knowledge

- Training on how to change and the skills needed after the change
- Involvement of training and SME groups to develop expectations

Ability

- On-the-job training and job aides to support the new behaviors
- Coaching by supervisors & leaders
- Troubleshooting

Reinforcement

- Messages by senior leaders that the change is here to last
- Individual coaching sessions to identify gaps & continued objections

Resources to SUPPORT SUCCESSFUL CHANGE



ASSESSMENT

Use this tool to assess where you are personally with a change, and use the results to evaluate what you need.



VIDEO

Why do our brains find change difficult? Trying to make sense of all the change around us.



CHAMPION

Use these **5 Steps to Becoming a Change Champion in the Workplace** as an easy reminder to foster support for change at work!



TOOLKITS

Executive Change Toolkit

Manager & Supervisor Change Toolkit

Employee Change Toolkit



CALL ME!

Looking for something else? Please reach out for a collaborative session to dig into what could help you with your specific situation.

Where do I **START...**

- What new insights or ideas have you gained about organizational change management?
- What is one thing you will do to foster an environment of positive change? How will you live the 'change agent' life?

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**“THE ONLY WAY TO MAKE
SENSE OUT OF CHANGE IS TO
PLUNGE INTO IT, MOVE WITH
IT, AND JOIN THE DANCE.”**

-Alan Watts

THANK YOU!

Jessica Armstrong, OCM Consultant

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DVR
Strategic
Visioning & Action Planning

Workshop
July 18-20

LIBERUM, LLC
Carli Easter
Jessica Armstrong
Samantha Trotter





Welcome

Thank you for your time!

Introductions

Name, what you do for DVR, and why DVR is your employer of choice.

Norms & Housekeeping

Let's establish and agree to operate under these norms together.

Words from Leadership

Cassi's hopes & dreams for this work and the three days we have together.

Songs & Tone


Share one of the songs you selected and why. Fun, safe, creative and positive tone!

Impromptu *Networking*

What do you hope to leave with from this visioning experience?



With all the changes occurring in DVR, why is this work important to continue and how will we ensure progress is made?



What attributes/qualities within this team do you appreciate?

Workshop Objectives & Expected Outcomes



GOAL

Develop a clear DVR strategic vision and action plan.



WHY

To further the goals of DVR collectively and continue to create meaningful employment outcomes for individuals with disabilities. Additional motivations for this impactful work:

- Create a DVR leadership 'NorthStar'
- Opportunity for rebirth, innovation, and growth
- Create a lasting and sustainable vision for future leaders to model for years to come



WORKSHOP OUTCOMES

- Strategic vision statement
- Leadership action plan
- Communication plan and materials
- Team connection

Workshop *Agenda*

- **Day 1: Setting the Course**
 - DVR Mission, Vision, & Values
 - SOAR Analysis
- **Day 2: Defining the Strategic Vision**
 - Examples & Cover Story
 - Shaping the Statement
- **Day 3: Action Planning & Next Steps**
 - Aligning Statement with DVR Strategic Work
 - Action & Communication Planning
 - Accountability & Next Steps



Day 1
**Setting
the
Course**



DVR Mission, Vision, & Values

Mission:

- Transforming lives by assisting individuals with disabilities to fully participate in their communities through meaningful employment.

Vision:

- Dedicated professionals leading the field of vocational rehabilitation, delivering exceptional experiences to every customer, every time.

Values:

- Transparency through clear, honest communication with customers, staff and partners.
- Acting with Integrity, upholding the ethics and values of our profession.
- Promoting a culture of Empowerment for customers and staff.
- Advancing rehabilitation practices through Innovation.
- Collaboration with customers, staff and partners that produces results.
- Commitment to Equity, Diversity and Inclusion in all of its forms to achieve excellence.

SOAR Analysis



STRENGTHS



OPPORTUNITIES



ASPIRATIONS



RESULTS

Recap & *Close*

- **What worked well?**
 - **What can be improved tomorrow?**
 - **One word to describe today's collaboration?**
- 



Defining the Strategic Vision

Day 2

Workshop Objectives & Expected Outcomes



GOAL

Develop a clear DVR strategic vision and action plan.



WHY

To further the goals of DVR collectively and continue to create meaningful employment outcomes for individuals with disabilities. Additional motivations for this impactful work:

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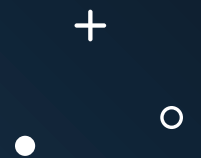


WORKSHOP OUTCOMES

- Strategic vision statement
- Leadership action plan
- Communication plan and materials
- Team connection

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Photo Icebreaker



What is a Strategic Vision?

- A strategic vision, or **strategic vision statement**, is a coherent and straightforward statement that outlines in broad terms what the organization wants to accomplish in the future.

Always striving to live the
statement!



VIDEO

Strategic Vision *Examples*

Amazon

- Our vision is to be the earth's most customer-centric company, where customers can find and discover anything they might want to buy online.

Starbucks

- To establish Starbucks as the premier purveyor of the finest coffee in the world while maintaining our uncompromising principles while we grow.

Microsoft

- To help people and businesses worldwide realize their full potential.

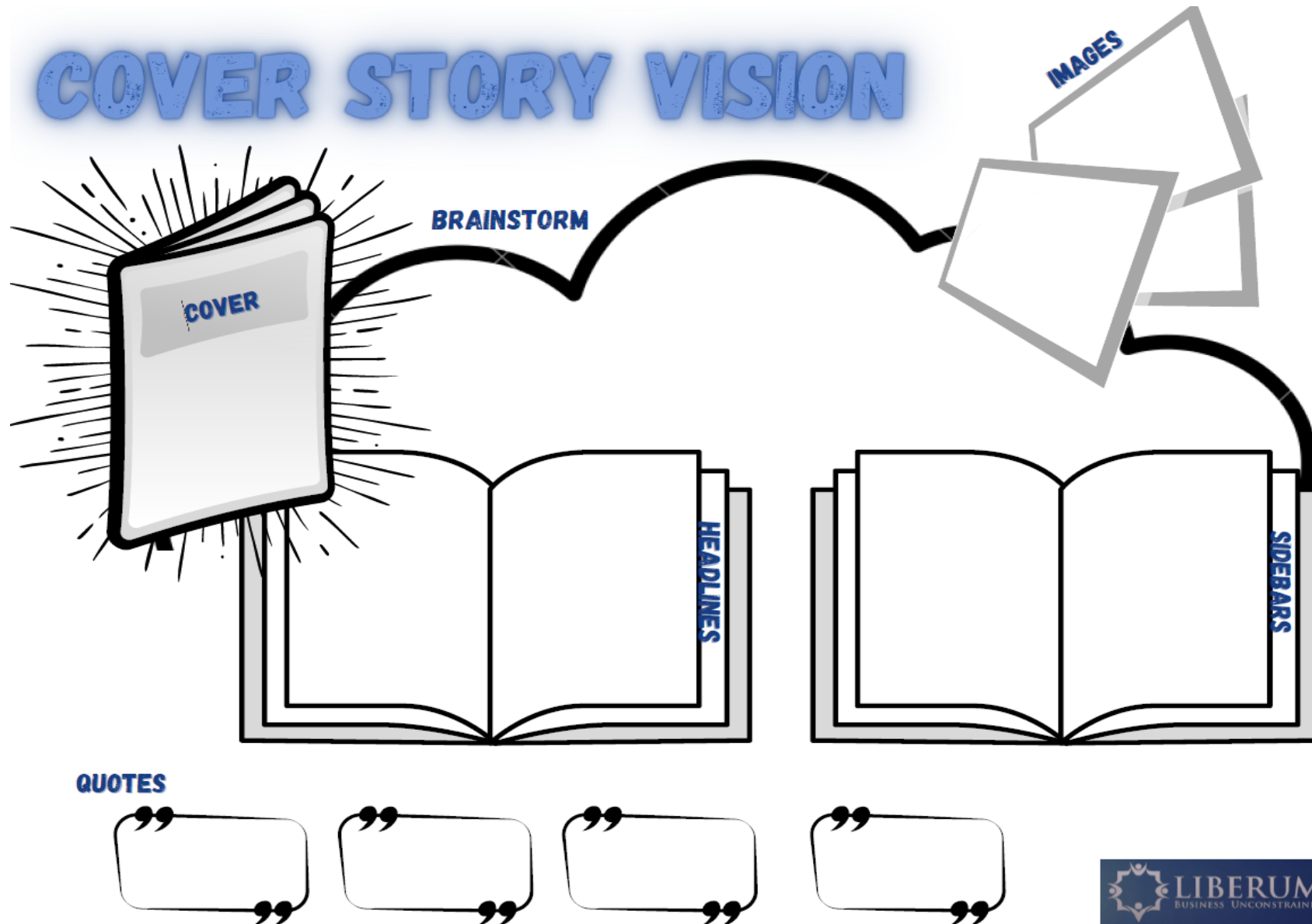
LinkedIn

- Create economic opportunity for every member of the global workforce.

Video

- We envision reaching every kid in our community excelling academically through high school and beyond.

Cover Story Vision *Activity*



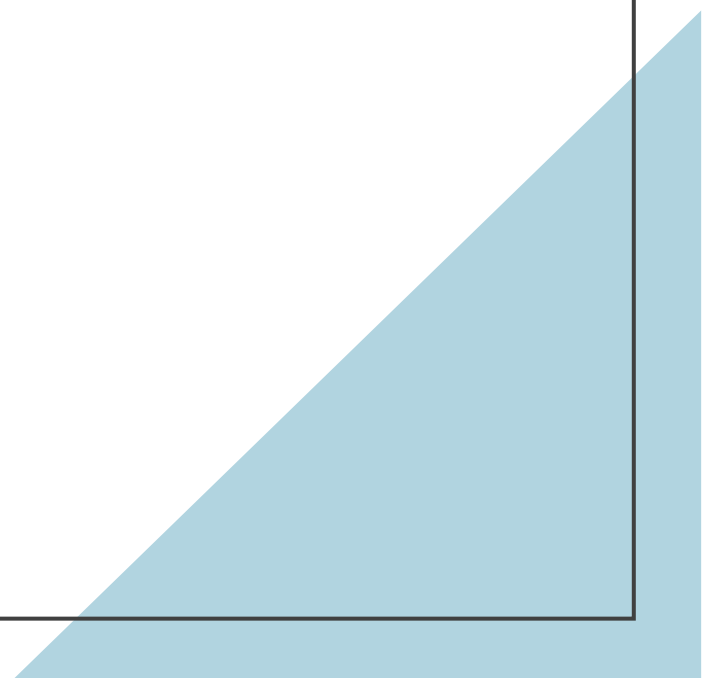
Lunch

Shaping the Vision Statement



Recap & *Close*

- **What worked well?**
- **What can be improved tomorrow?**
- **Share a key takeaway from today.**



Day 3

Action Planning & Next Steps

Welcome & Recap Day 2

- Finalize our Strategic Vision Statement

Connecting to Other DVR Strategic Work

- DSHS Strategic Plan
- DVR State Plan
- DVR Strategic Plan and Goals
- DVR Results
- Fundamentals Map
- Washington State Rehabilitation Council (WSRC) Recommendations

Putting the Strategic Vision into Action

- Communication Plan & Timeline
- Action Plan & Leads

Close & Next Steps

- Next Steps & Accountability
- Follow Up Meetings

Workshop Objectives & Expected Outcomes



GOAL

Develop a clear DVR strategic vision and action plan.



WHY

To further the goals of DVR collectively and continue to create meaningful employment outcomes for individuals with disabilities. Additional motivations for this impactful work:

- Create a DVR leadership 'NorthStar'
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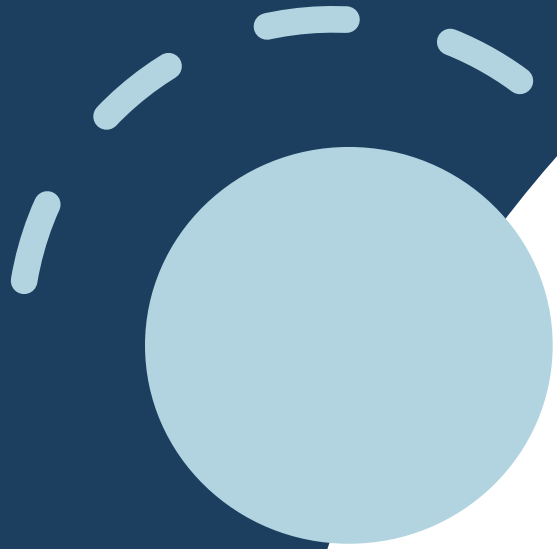
WORKSHOP OUTCOMES

- Strategic vision statement
- Leadership action plan
- Communication plan and materials
- Team connection

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How did the homework
go?

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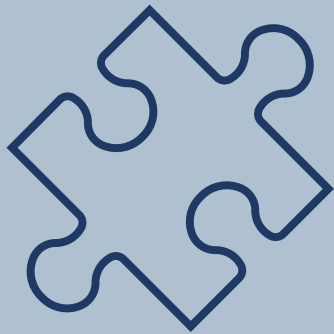


DRAFT VISION STATEMENT

To empower students, youth, and adults with disabilities to dream big and achieve their employment goals through meaningful partnerships and equitable access to impactful services.

Putting the
Strategic Vision
into **Action**

Connecting to Other DVR Strategic Work



- DSHS Strategic Plan
- DVR State Plan
- DVR Strategic Plan and Goals
- DVR Results
- Fundamentals Map
- Washington State Rehabilitation Council (WSRC) Recommendations



Bold Steps to Share Vision?

Communications & Rollout Timeline

Telling Our Story

Email to All Staff: **ASAP**

Outcome(s): Provide context, reinforce context why or why not. Can you see yourself, students and customers in statement. Continuing the work we are already doing with improvements.

All Staff Meeting to Share Vision Statement: **1-Month**

Outcome(s): Reinforce the messaging from email and share vision statement. Ask the question, open ended feedback; Do they like, why or why not? Expand or propose idea/additional thoughts. What will we do with the feedback/impact. Why do we need. Share storybook!

DVR In-Service: **Oct 24-25**

Outcome(s): Director share the vision statement, talking points, why now, and how it ties into all other work. (Samantha's visual?) Feedback from staff; quotes on why staff like.

Lunch

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How are you going to
show up differently?
(Dance moves!)

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Accountability Measures



ADDED WORKSHOP ITEM



PEER ACCOUNTABILITY



30, 60, 90 DAY CHECK-IN

Recap & *Close*

- **Review expected outcomes; did we hit the mark?**
- **Share a win from this workshop.**
- **Poll everywhere; use to poll teams.**
- **Cassi closing remarks. We did it!**
- **[FUN Video!](#) 😊**



Washington State
Department of Social
& Health Services

Transforming lives

Division of Vocational Rehabilitation

DVR Strategic Visioning Storybook

Presented by the DVR Expanded Leadership Team
September 2023



Mission:

Transforming lives by assisting individuals with disabilities to fully participate in their communities through meaningful employment.

Vision:

Dedicated professionals leading the field of vocational rehabilitations, delivering exceptional experiences to every customer, every time.

Values:

- Transparency
- Integrity
- Empowerment
- Innovation
- Collaboration
- Equity, Diversity, Access & Inclusion

**Current DVR
Mission, Vision, & Values.**

Does the current vision tell our story?



Overview of Workshop

Outlining Our Story.



We recognize our current vision does not align with our expectations of the future of VR and a change is needed.



We categorized our strengths, aspirations, opportunities, and the results we want to see as an organization. There were common themes across all areas.



This meeting did not include any strategic planning related to vision. Instead, we discussed alignment with the vision in future decision making.



We reviewed and discussed priorities from the feds, from our state, and our expectations as a team.

Key DVR Goals.

- Highly Engaged, Diverse and Skilled Team
- Strong Business and Community Relationships
- Effective, Efficient, and Safe Operations
- Customer Service Excellence
- Successful Customer Outcomes



Photo credit: Nathan Anderson via Unsplash Images



Current DVR Vision Statement.

Dedicated professionals leading the field of vocational rehabilitation, delivering exceptional experiences to every customer, every time.



New DRAFT DVR Vision Statement.

To empower students, youth, and adults with disabilities to dream big and achieve their employment goals through meaningful partnerships and equitable access to impactful services.

DVR Strategic Work Connected.

There are multiple 'chapters' used to tell our DVR story and organize our actions to live our vision.



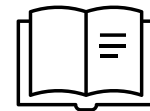
State Plan

Describes goals, priorities, partnerships, services & activities.



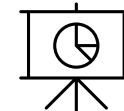
Fundamentals Map

Team alignment & connection to DVR's goals & outcomes.



Strategic Plan

Outlines the long-term goals & strategies of an organization.

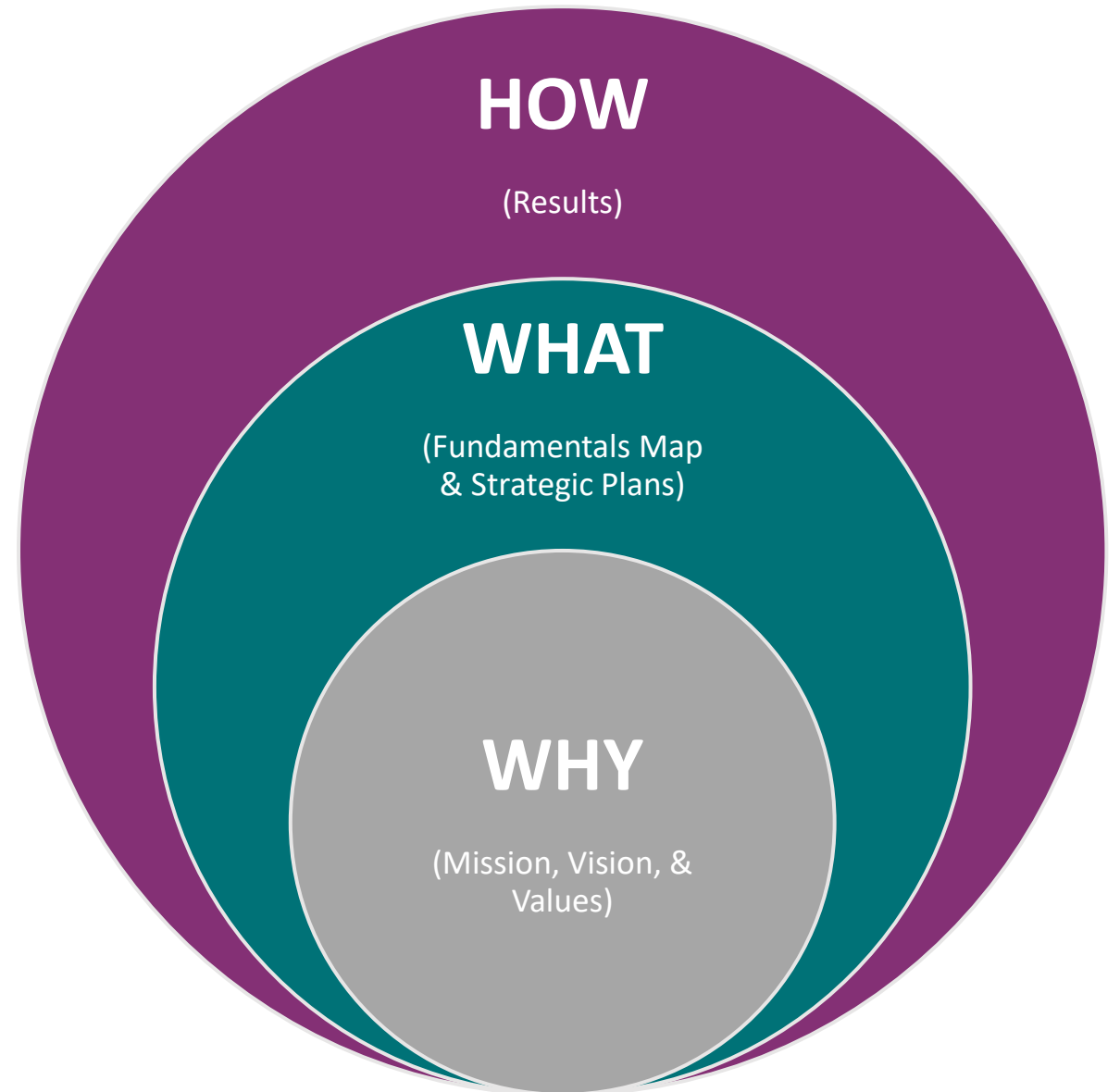


Results

Tracks & organizes progress of DVR projects, goals & outcomes.

DVR Strategic Work Connected.

How the 'chapters' fit together to get us to action.





Measuring Our Success

Top Four Priorities:

- Business Modernization
- EDAI in Everything We Do
- Evolution of the VR Program (Alignment of Federal Regulations & WIOA)
- Improve Customer Outcomes

DVR Strategic Plan Metrics 2023-2025

(Full breakdown of all DVR success measures)

- DVR State Plan
- DVR 2023-2025 Strategic Plan
- DVR Strategic eBook
- DVR Fundamentals Map (DRAFT)
- Results

DVR Strategic Resources

All the 'chapters' that make up our story and actions to live our vision.





Next Steps

Share new DRAFT vision statement with DVR staff via email.

Collect feedback and review for possible changes to DRAFT new vision statement.

Per feedback, ELT finalize new vision statement.

Share final vision statement at DVR In-Service.



I could not have imagined
the blessing DVR would
be to my life.

- Darnell Ford, past DVR customers

Thank you!

Questions and feedback welcome.
We cannot wait to continue to tell our story at our
DVR in-service this October!



Washington State
Department of Social
& Health Services

Transforming lives

Division of Vocational Rehabilitation