

Bidder Reference Check for: Applied Technical

Reference Name: _____

Email Reference Template:

Good afternoon:

I'm Clayton Long, a procurement coordinator for the Washington State Department of Enterprise Services and I'm conducting reference checks on a competitive solicitation to procure Business Consulting Services (*Change Management, Organizational Development & Management and Business Analysis*). This company submitted a bid and provided your organization as a reference.

Objective: References should be checked to help determine if the top-scored bidder(s) are responsible prior to proceeding to the announcement of apparent successful bidders. References are a good way to determine the bidder's ability to meet the solicitation requirements.

Thank you for your time. If possible, **please respond by January 18, 2022 to:** clayton.long@des.wa.gov

Instructions: Work with the sourcing team to confirm a list of questions/criteria to check via references. References can be done over the phone or via email, but via email should be the preferred and default approach. Start with the *Email Reference Template* below and modify the list of questions/criteria as applicable to your commodity.

Background and scope. Please provide the following background information about the products and/or services your organization procured from the bidder.

- When did you work with this company and for how long:
- Briefly describe the type of products and/or services:
- Provided estimated value of the products and/or services:

Please provide a score and a brief explanation for each criteria below using the following scoring guide:

Rating	Assessment	Definition
100%	Excellent	Company fully met or exceeded the requirements and business needs.
75%	Good	Company fully met the requirements and the business needs, but there was room for improvement. There was a minor deficiency not in a key area.
50%	Acceptable	Company sufficiently met the requirements and the business needs. There were no critical deficiencies, but products and/or services had numerous weaknesses in key areas.
25%	Poor	Company only partially met the requirements and the business needs. There were critical deficiencies in key areas.
0%	Unacceptable	Company did not meet the requirements and business needs.

1. Level of communication and customer service (i.e., responsiveness and issue resolution).
 - Rating:
 - Brief explanation:
2. Adherence of services to the company's assured qualifications:
 - Rating:
 - Brief explanation:
3. Quality of implementation planning.
 - Rating:
 - Brief explanation:
4. Adherence to project schedule and budget:
 - Rating:
 - Brief explanation:
5. Overall satisfaction
 - Rating:
 - Brief explanation:
6. Additional Information you would like to bring to the attention of the Department of Enterprise Services about your business relationship with the bidder:



EXHIBIT A-1 – BIDDER’S CERTIFICATION

Competitive Solicitation:	No. 01620 – Business Consulting Services		
Bidder:	<u>Applied Technical Systems, Inc.</u> Type/print full legal name of Bidder		
Bidder’s Address:	<u>9307 Bayshore Drive Suite 301, Silverdale, WA 98383</u> Type/print Bidder’s Address		
Bidder Organization Type: Check appropriate box	Corporation:	☒ Domestic	☐ Foreign
	Limited Liability Company (LLC):	☐ Domestic	☐ Foreign
	Partnership:	☐ Domestic	☐ Foreign
	Sole Proprietorship:	☐	
State of Formation:	<u>Washington</u> Type/print the state where the corporation, LLC, or partnership is formed – e.g., ‘Washington’ if domestic and the name of the state if ‘Foreign’ (i.e., not Washington)		

Bidder, through the duly authorized undersigned, makes this certification as a required element of submitting a responsive bid. Bidder certifies, to the best of its knowledge and belief, that the following are true, complete, correct, and made in good faith:

1. **UNDERSTANDING.** Bidder certifies that Bidder has read, thoroughly examined, and fully understands all of the provisions in the Competitive Solicitation (including all exhibits) and the terms and conditions of the Master Contract and any amendments or clarifications to the Competitive Solicitation, and agrees to abide by the same.
2. **ACCURACY.** Bidder certifies that Bidder has carefully prepared and reviewed its bid and fully supports the accuracy of the same. Bidder further understands and acknowledges that Enterprise Services shall not be responsible for any errors or omission on the part of Bidder in preparing its bid. Bidder certifies that the facts declared here are true and accurate. Bidder further understands and acknowledges that the continuing compliance with these statements and all requirements of the Competitive Solicitation are conditions precedent to the award or continuation of the resulting Master Contract.
3. **NO COLLUSION OR ANTI-COMPETITIVE PRACTICES.** Bidder certifies that Bidder has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with this Competitive Solicitation. Bidder certifies that Bidder’s bid prices have been arrived at independently, without engaging in collusion, bid rigging, or any other illegal activity, and without for the purpose of restricting

competition any consultation, communication, or agreement with any other bidder or competitor relating to (a) those prices, (b) the intention to submit a bid, or (c) the methods or factors used to calculate the prices offered. Bidder certifies that Bidder has not been and will not knowingly disclose its bid prices, directly or indirectly, to any other bidder or competitor before award of a Master Contract, unless otherwise required by law. Bidder certifies that Bidder has made no attempt and shall not make any attempt to induce any other person or firm to submit or not to submit a bid for the purpose of restricting competition. Bidder, however, freely may join with other persons or organizations for the purpose of presenting a bid.

4. FIRM OFFER. Bidder certifies that its bid, attached hereto, is a firm offer which cannot be withdrawn for a period of ninety (90) days from and after the bid due date specified in the Competitive Solicitation. Enterprise Services may accept such bid, with or without further negotiation, at any time within such period. In the event of a protest, Bidder's bid shall remain valid for such period or until the protest and any related court action is resolved, whichever is later.
5. CONFLICT OF INTEREST. Bidder certifies that, in preparing this bid, Bidder has not been assisted by any current or former employee of the State of Washington whose duties relate (or did relate) to this Competitive Solicitation, or prospective Master Contract, and who was assisting in other than his or her official, public capacity. Neither does such a person nor any member of his or her immediate family have any financial interest in the outcome of this bid.
6. NO REIMBURSEMENT. Bidder certifies that Bidder understands that the State of Washington will not reimburse Bidder for any costs incurred in the preparation of this bid. All bids become the property of the State of Washington, and Bidder claims no proprietary right to the ideas, writings, items, or samples unless so stated in the bid.
7. PERFORMANCE. Bidder certifies that Bidder understands that its submittal of a bid and execution of this Bidder's Certification certifies bidder's willingness to comply with the Master Contract, if awarded such. By submitting this bid, Bidder hereby offers to furnish the goods and/or services solicited pursuant to this Competitive Solicitation in compliance with all terms, conditions, and performance requirements contained in this Competitive Solicitation and the resulting Master Contract or, if applicable, as detailed on a Contract Issues List, if permitted, in this Competitive Solicitation.
8. INSURANCE. Bidder certifies as follows (must check one):

✓ *BIDDER HAS REQUIRED INSURANCE.* Bidder has attached a current, valid Certificate of Insurance with each and all of the required insurance coverages as specified in the Master Contract (note: Bidder must attach the Insurance Certificate).

OR

☐ *BIDDER WILL OBTAIN REQUIRED INSURANCE.* Bidder does not have a current, valid Certificate of Insurance with each and all of the required insurance coverages as specified in the Master Contract but, if designated as the Apparent Successful Bidder, Bidder will provide such a Certificate of Insurance, without exception of any kind, to Enterprise Services within twenty-four (24) hours of such designation or notification by Enterprise Services or be deemed a nonresponsive bid.

OR

☐ *BIDDER DOES NOT HAVE REQUIRED INSURANCE.* As detailed on the attached explanation (Bidder to provide), Bidder does not have a current, valid Certificate of Insurance

with each and all of the required insurance coverages as specified in the Master Contract and, if designated as the Apparent Successful Bidder would not be able to provide such a Certificate of Insurance to Enterprise Services within twenty-four (24) hours of such designation.

9. DEBARMENT. Bidder certifies as follows (must check one):

- ☒ *NO DEBARMENT.* Bidder and/or its principals are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from contracting with any federal, state, or local governmental entity.

OR

- ☐ *DEBARRED.* As detailed on the attached explanation (Bidder to provide), Bidder and/or its principals presently are debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from contracting with a federal, state, or local governmental entity.

10. CRIMINAL OFFENSE. Bidder certifies as follows (must check one):

- ☒ *NO CRIMINAL OFFENSE.* Bidder has not, within the three (3) year period preceding the date of this Competitive Solicitation, been convicted or had a civil judgment rendered against Bidder for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a governmental contract; violation of any federal or state antitrust statute; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property. Bidder further certifies that it is not presently indicted or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated in this paragraph.

OR

- ☐ *CRIMINAL OFFENSE.* As detailed on the attached explanation (Bidder to provide), within the three (3) year period preceding the date of this Competitive Solicitation, Bidder has been convicted or had a civil judgment rendered against Bidder for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a governmental contract; violation of any federal or state antitrust statute; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.

11. WAGE THEFT PREVENTION. Bidder certifies as follows (must check one):

- ☒ *NO WAGE VIOLATIONS.* Bidder has NOT been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in [RCW 49.48.082](#), any provision of RCW chapters [49.46](#), [49.48](#), or [49.52](#) within three (3) years prior to the date of the above-referenced Competitive Solicitation date.

OR

- ☐ *VIOLATIONS OF WAGE LAWS.* Bidder has been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in [RCW 49.48.082](#), a provision of RCW chapters [49.46](#), [49.48](#), or [49.52](#) within three (3) years prior to the date of the

above-referenced Competitive Solicitation date.

12. PAY EQUALITY. Bidder certifies as follows (must check one):

- ✓ *PAY EQUALITY FOR SIMILARLY EMPLOYED WORKERS.* Bidder's similarly employed individuals are compensated as equals. For purposes of this provision, employees are similarly employed if the individuals work for the same employer, the performance of the job requires comparable skill, effort, and responsibility, and the jobs are performed under similar working conditions. Job titles alone are not determinative of whether employees are similarly employed. Bidder may allow differentials in compensation for its workers based in good faith on any of the following: a seniority system; a merit system; a system that measures earnings by quantity or quality of production; a bona fide job-related factor or factors; or a bona fide regional difference in compensation levels. A bona fide job-related factor or factors may include, but not be limited to, education, training, or experience that is: consistent with business necessity; not based on or derived from a gender-based differential; and accounts for the entire differential. A bona fide regional difference in compensation level must be consistent with business necessity; not based on or derived from a gender-based differential; and account for the entire differential.

OR

- ☐ *NO PAY EQUALITY FOR SIMILARLY EMPLOYED WORKERS.* Bidder's similarly employed individuals are NOT compensated as equals.

13. WORKERS' RIGHTS (EXECUTIVE ORDER 18-03). Bidder certifies as follows (must check one):

- ✓ *NO MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES.* Bidder does NOT require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

OR

- ☐ *MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES.* Bidder requires its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

14. TERMINATION FOR DEFAULT OR CAUSE. Bidder certifies as follows (must check one):

- ✓ *NO TERMINATION FOR DEFAULT OR CAUSE.* Bidder has not, within the three (3) year period preceding the date of this Competitive Solicitation, had one (1) or more federal, state, or local governmental contracts terminated for cause or default.

OR

- ☐ *TERMINATION FOR DEFAULT OR CAUSE.* As detailed on the attached explanation (Bidder to provide), within the three (3) year period preceding the date of this Competitive Solicitation, Bidder has had one (1) or more federal, state, or local governmental contracts terminated for cause or default.

15. TAXES. Bidder certifies as follows (must check one):

- ✓ *TAXES PAID.* Except as validly contested, Bidder is not delinquent and has paid or has arranged for payment of all taxes due to the State of Washington and has filed all required returns and reports as applicable.

OR

- ☐ *DELINQUENT TAXES.* As detailed on the attached explanation (Bidder to provide), Bidder has not paid or arranged for payment of all taxes due to the State of Washington and/or has not timely filed all required returns and reports as applicable.

16. *LAWFUL REGISTRATION.* Bidder, if conducting business other than as a sole proprietorship (e.g., Bidder is a corporation, limited liability company, partnership) certifies as follows (must check one):

- ✓ *CURRENT LAWFUL REGISTRATION.* Bidder is in good standing in the State of Washington and the jurisdiction where Bidder is organized, including having timely filed all required annual reports.

OR

- ☐ *DELINQUENT REGISTRATION.* As detailed on the attached explanation (Bidder to provide), Bidder currently is not in good standing in the State of Washington and/or the jurisdiction where Bidder is organized.

17. *SUBCONTRACTORS.* Bidder certifies as follows (must check one):

- ☐ *NO SUBCONTRACTORS.* If awarded a Master Contract, Bidder will not utilize subcontractors to provide the goods and/or services subject to this Competitive Solicitation.

OR

- ✓ *SUBCONTRACTORS.* As detailed on the attached explanation (Bidder to provide), If awarded a Master Contract, Bidder will utilize subcontractors to provide the goods and/or services subject to this Competitive Solicitation. In such event, Bidder certifies that, as to the State, Bidder shall retain responsibility for its subcontractors, including, without limitation, liability for any subcontractor's acts or omissions. Note: Bidder must provide the precise legal name (including state of organization), business address, and federal tax identification number (TIN) for each subcontractor. Note: If the TIN is a SSN, provide only the last four (4) digits.

18. *WASHINGTON SMALL BUSINESS.* Bidder certifies as follows (must check one):

- ✓ *WASHINGTON SMALL BUSINESS.* Bidder is a Washington Small Business as defined in RCW 39.26.010. To qualify as a Washington Small Business, bidder must meet two (3) requirements:

1. 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.
2. 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 its federal income tax return or its return filed with the Washington State Department of Revenue over the previous three consecutive years).
3. Bidder must have certified its small business status in [WEBS](#).

OR

☐ *NOT WASHINGTON SMALL BUSINESS.* Bidder is not a Washington Small Business as defined in RCW 39.26.010.

19. **VETERAN-OWNED BUSINESS.** Bidder certifies as follows (must check one):

✓ *VETERAN-OWNED BUSINESS.* Bidder is a certified Veteran-Owned business under RCW 43.60A.190 and is identified as such on WEBS (which is confirmed by the Washington Department of Veterans' Affairs).

OR

☐ *NOT VETERAN-OWNED BUSINESS.* Bidder is not a certified Veteran-Owned business under RCW 43.60A.190.

20. **REFERENCES.** Bidder certifies that the references provided to Enterprise Services have worked with Bidder and that such individuals and firms have full permission, without any additional requirement or release, to provide such references and information to Enterprise Services. Bidder hereby authorizes Enterprise Services (or its agent) to contact Bidder's references and others who may have pertinent information regarding Bidder's prior experience and ability to perform the Master Contract, if awarded. Bidder hereby authorizes such individuals and firms to provide such references and release to Enterprise Services information pertaining to the same.

Bidder further certifies that it shall provide immediate written notice to Enterprise Services if, at any time prior to a contract award, Bidder learns that any of its certifications set forth herein were erroneous when submitted or has become erroneous by reason of changed circumstances.

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 duly authorized to make these certifications on behalf of the Bidder listed herein.

BIDDER NAME: APPLIED TECHNICAL SYSTEMS, INC

Print Name of Bidder – Print full legal entity name of the firm submitting the Bid

By:



Jonathan Guidry

Print Name of person making certifications for Bidder

Place: Silverdale, WA

Print city and state where signed

Signature of Bidder's authorized person

Title: Chief Operating Officer

Title of person signing certificate

Date: January 19, 2021

Return this Bidder's Certification to Procurement Coordinator at:

DESContractsTeamCedar@des.wa.gov



EXHIBIT A-2 – BIDDER’S PROFILE

Competitive Solicitation No.:	01620 – Business Consulting Services
Bidder:	Applied Technical Systems, Inc.

BIDDER INFORMATION	
Legal name and address of Bidder: Note: This must match information from Business License	Applied Technical Systems, Inc. Business Name 9307 Bayshore Dr NW Suite 301 Address Silverdale, WA 98383-9161 City, State, Zip Code
Washington State Department of Revenue Registration Number: Note: This is the Unified Business Identifier (UBI)	<u>600-357-234</u>
Federal Tax ID No. (TIN): Note: If your TIN is a Social Security number, provide only the last four digits.	<u>91-1098556</u>
Is your firm certified as a minority or woman owned business with the Washington State Office of Minority & Women’s Business Enterprises (OMWBE)?	Yes ☐ No ☒ If yes, provide MWBE certification no. _____
Is your firm a self-certified Washington State small business? Note: See definitions of ‘microbusiness,’ ‘minibusiness,’ and ‘small business,’ set forth in RCW 39.26.010.	Yes ☒ No ☐ If yes, what is your business size? Small ☒ Mini ☐ Micro ☐
Is your firm certified as Veteran Owned with the Washington State Department of Veteran Affairs?	Yes ☒ No ☐ If yes, provide WSDVA certification no. <u>QCDE45BF.</u>

CONTRACT MANAGEMENT POINTS OF CONTACT	
Authorized Representative Name: <u>Felicia Hudlow</u> Email: <u>felicia.hudlow@atsid.com</u> Phone: <u>360.989.3370</u>	Contract Administrator Name: <u>Erica Krueger</u> Email: <u>erica.krueger@atsid.com</u> Phone: <u>360.989.3349</u>
Sales Reporting Representative Name: <u>Felicia Hudlow</u> Email: <u>felicia.hudlow@atsid.com</u> Phone: <u>360.989.3370</u>	Sales Reporting Alternate Name: <u>Erica Krueger</u> Email: <u>erica.krueger@atsid.com</u> Phone: <u>360.989.3349</u>
Management Fee Representative Name: <u>Felicia Hudlow</u> Email: <u>felicia.hudlow@atsid.com</u> Phone: <u>360.989.3370</u>	Management Fee Contact Alternate Name: <u>Erica Krueger</u> Email: <u>erica.krueger@atsid.com</u> Phone: <u>360.989.3349</u>
Address for Enterprise Services to send management fee invoices: Company name: <u>Applied Technical Systems, Inc</u> Attn: <u>Felicia Hudlow</u> Address: <u>9307 Bayshore Drive NW Suite 301</u> City/State/Zip: <u>Silverdale, WA 98383</u>	

ORDERING/SALES POINTS OF CONTACT (expand as necessary)			
Name	Phone Number	E-mail	Area of Responsibility
Jon Guidry	337-280-5447	jon.guidry@atsid.com	All
Michele Myers	571-285-2282	michele.myers@atsid.com	All

REFERENCES

Provide a minimum of two (2) commercial or government references for which bidder has delivered goods and/or services similar in scope as described in the Competitive Solicitation. Additional references may be required if Bidder intends to submit a bid for more than one category. See instructions in *Exhibit C-1 – Bid Evaluation Criteria*, Item No. 2 Experience.

Reference 1 – Organizational Development, if applicable	
Company Name:	<u>Ilmor Engineering, Inc.</u>
Contact & Title:	<u>Paul W. Ray, President</u>
Phone:	<u>734.604.1051</u>
Email:	<u>paulray@ilmor.com</u>
<i>Please note that our teaming partner TEKsystems performed work for this reference as a subcontractor and requests the ability to coordinate the introduction between DES and this reference.</i>	
Reference 2 – Organizational Development, if applicable	
Company Name:	<u>X-Ray Industries</u>
Contact & Title:	<u>Diane Dardzinski, Human Resources Director</u>
Phone:	<u>248.244.1527</u>
Email:	<u>diane.dardzinski@xrayindustries.com</u>
<i>Please note that our teaming partner TEKsystems performed work for this reference.</i>	
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Reference 1 – Change Management, if applicable	
Company Name:	<u>United States Patent and Trademark Office</u>
Contact & Title:	<u>Carol Stout, Deputy Director Office of Financial Management Systems</u>
Phone:	<u>571.265.1199</u>
Email:	<u>carol.stout@uspto.gov</u>
Reference 2 – Change Management, if applicable	
Company Name:	<u>Boewe Consulting, LLC</u>
Contact & Title:	<u>Todd Boewe, Chief Executive Officer</u>
Phone:	<u>360.710.5301</u>
Email:	<u>toddb@boeweconsulting.com</u>
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Reference 1 – Management and Business Analysis, if applicable	
Company Name:	<u>Naval Surface Warfare Center Crane</u>
Contact & Title:	<u>Nancy Stuffle, Contracting Officer</u>
Phone:	<u>812.854.1178</u>
Email:	<u>nancy.stuffle@navy.mil</u>
Reference 2 – Management and Business Analysis, if applicable	
Company Name:	<u>Boewe Consulting, LLC</u>
Contact & Title:	<u>Todd Boewe, Chief Executive Officer</u>
Phone:	<u>360.710.5301</u>
Email:	<u>toddb@boeweconsulting.com</u>

PURCHASE CARDS (I.E., CREDIT CARDS)

Please indicate which types of purchasing (credit) cards are accepted (note: any card fees must be included in the unit price of the bid):

☐ Visa ☐ Master Card ☐ American Express ☐ Discover ☒ Other: None

Return this Bidder's Profile to Procurement Coordinator at:

DESContractsTeamCedar@des.wa.gov



EXHIBIT A-3 - RESPONSIBLE BIDDER (COMPETENCIES)

Competitive Solicitation:	No. 01620 – Business Consulting Services
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Bidder, through the duly authorized undersigned, makes this certification as a required element of submitting a responsive bid. Bidder certifies, to the best of its knowledge and belief that the following are true, complete, correct, and made in good faith:

Diversity, Equity, and Inclusion (DEI) is important to Washington State must be present in the fabric of the work we do in all areas. For professional services, where outside entities are coming into and directing the work of our civil servants, it is essential that they align with these values. As a requirement for responsibility, your firm must attest to the state's values and culture. This will become part of any resultant contract and Bidder will be required to meet or exceed the commitments listed herein.

ATTESTATION

☒ I and the named leader(s) below have read and understand the [Washington State Enterprise Leadership Competencies](#) and the Enterprise DEI Competencies for all employees posted by the [DEI Committee of the Office of Financial Management](#), and titled "Enterprise DEI Competencies – All Employees – A pathway for success [PDF]". The named leader(s) below have the authority to, and shall ensure, that Bidder, Bidder's employees, and Bidder's subcontractors will follow the base expectation for values and culture established by Washington State. As Washington State continues to listen to our state family, this leader will enhance diversity, equity, and inclusion within this organization. I will notify Enterprise Services within 30 days if these named leader(s) need to be changed.

<u>Jon Guidry, Chief Operating Officer</u> Name, Title	 Signature	<u>1/21/21</u> Date
 Name, Title	 Signature	 Date
 Name, Title	 Signature	 Date

CERTIFICATION

Bidder further certifies that it shall provide immediate written notice to Enterprise Services if, at any time prior to a contract award, Bidder learns that any of its certifications set forth herein were erroneous when submitted or has become erroneous by reason of changed circumstances.

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 duly authorized to make these certifications on behalf of the Bidder listed herein.

BIDDER NAME: APPLIED TECHNICAL SYSTEMS, INC.

Print Name of Bidder – Print full legal entity name of the firm submitting the Bid

By:



Jon Guidry

Print Name of person making certifications for Bidder

Signature of Bidder's authorized person

Place: Silverdale, WA

Print city and state where signed

Title: Chief Operating Officer

Title of person signing certificate

Date: 1/21/21

Return this Bidder's Certification to Procurement Coordinator at:

DESContractsTeamCedar@des.wa.gov

Bidder Name: Applied Technical Systems, Inc.

Categories that your company is bidding on (Mandatory, Not Scored)

Check the box(s) next to each category that your company is bidding on:

- ☒ Organizational Development
- ☒ Change Management
- ☒ Management and Business Analysis

Bidder's Organization (4 pages maximum) (150 points)

Washington State Department of Enterprise Services (DES) seeks responsive and responsible partners who can provide skilled organizational development, change management, and management and business analysis talent to support your agency. DES requires a partner who can deliver qualified staff, and then manage and retain that talent to provide continuity for the duration of each project. To effectively meet your needs and exceed your expectations, our team, led by our experienced Program Manager (PM), will deliver highly skilled staff with experience implementing efficient processes that will allow us to manage cost, performance, and schedule with responsiveness and scalability.

We were founded in 1980 by a U.S. Navy veteran, who throughout his career has been directly responsible for the design, development, and implementation of numerous highly innovative and effective business processes for major federal customers. This was the start of our emergence as a leader in creating innovative solutions for a variety of federal, state, and commercial customers.

Today, we continue to deliver user-focused services and solutions. In the last 40 years, we have remained a trustworthy resource for our clients. By using iterative methodologies, we quickly deliver useful solutions and actionable insights, and then work to continuously improve them. With each day, we continue to raise our standards.

We are also supported by a subcontractor partner not only possessing extensive experience in Washington State, but also throughout the U.S. Their 37-year experience providing strong talent to government agencies like DES—combined with a just-in-time sourcing strategy that aligns you with professionals whose qualifications and working styles are best suited to the requirements outlined within Exhibit B—ensure that you will receive the quality of service necessary to meet your goals under this competitive solicitation.

We offer DES master contract customers unmatched technical capability, complemented by an understanding of your environment built through decades of collective experience. In the sections that follow, we describe our abilities in executing all requirements, underscored by our team's significant strengths, including our:

- ***Broad technical expertise that delivers comprehensive support.*** We bring industry experts who maintain a local presence and have significant experience with DES customers and/or relevant stakeholders. We have organized our team with agreements designed to maximize the team's full resources and deliver the best athletes to DES customers. Our combination of technical and industry alignment when assembling our team ensures we understand the needs and challenges specific to state agencies like DES for the categories outlined under this competitive solicitation.
- ***Local offices, years of investing in Washington, and nationwide reach*** that deliver a uniquely effective recruiting and retention approach to deliver quality staff in the region. When necessary, we can also tap into a nationwide talent network to source talent with the qualifications necessary to successfully achieve DES' objectives. We staff the right people with the right skills and invest in their personal and professional development to maximize staffing continuity and minimize disruptions from staff changeouts.

- **Scalable and efficient management approach that prioritizes transparency and efficiency.**

We use proven Project Management Body of Knowledge (PMBOK)-based processes to achieve high performance standards, execute a predictable schedule, and manage cost effectively and accurately with frequent reporting.

Our International Organization for Standardization (ISO) 9001:2015 and Capability Maturity Model Integration (CMMI) Level III accreditations prove that we have created standards to meet DES customer needs within statutory and regulatory requirements related to a product or service. We hold a Secret Facility Clearance with Secret Safeguarding. As seen in Figure 1, our team offers recent experience and capabilities across all Performance Requirements.

"You have been described as getting it done", "paving the way", "doing it in action", "collaboration in action." I see these approaches as new in the Federal Government arena and your efforts continue to LEAD the rest of the agency in these areas.... It is difficult to quantify how much I appreciate your dedication and perseverance. The industriousness, conscientiousness, and diligence that you've displayed throughout this Project are truly commendable."

Chief Financial Officer, Federal Government Customer

	Project						
	1	2	3	4	5	6	7
Performance Requirements: Organizational Development							
Executive Coaching	-	-	-	-	-	•	•
Team Development Coaching	-	-	-	-	-	•	•
Coaching Workshops	-	-	-	-	-	•	•
Performance Requirements: Change Management							
Strategic Planning	•	•	•	-	-	•	•
Process Improvement	•	•	•	•	•	•	•
Performance Requirements: Management and Business Analysis							
Assist Management	•	•	•	•	•	•	•
Impact Agency Policy	•	•	•	-	•	•	•
Program Development	•	•	•	•	•	•	•
Stakeholder Analysis	•	•	•	•	•	•	•
Maintain Requirements	•	•	•	•	•	•	•
Change Management	•	•	•	•	•	•	•
Meeting Objectives/Goals	•	•	•	•	•	•	•
Performance Requirements: General Practices							
Root Cause Analysis	•	•	•	•	•	•	•
Data Driven Decisions	•	•	•	•	•	•	•
Objectivity and Integrity	•	•	•	•	•	•	•
Safe Learning Environment	•	•	•	•	•	•	•
Empower the Organization	•	•	•	•	•	•	•
Psychological Safety	•	•	•	•	•	•	•
Diversity, Equity, and Inclusion	•	•	•	•	•	•	•

Inclusive policies/metrics	•	•	•	•	•		
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Figure 1: We bring significant proven performance for a variety of customers across all performance requirements.

Beyond our corporate capabilities, we bring a team of professionals that are talented, driven, dedicated, innovative, and ambitious. As seen in the details provided in Figure 2, we bring the expertise and talent to help DES activate ideas and develop solutions. We listen carefully to understand the DES culture and partner with you to tackle DES customer business challenges. Our solutions are crafted to your reality. We create agility and momentum, and we are specialists in planning, implementation, and real-world application. Whether it is a compelling vision for tomorrow or a hit-the-ground running project, we will work together to advance DES customer transformation.

	Consultant						
	A	B	C	D	E	F	G
Key Skills							
Organizational Development	•	•	•	•	•	•	-
Executive Coaching	•	•	•	•	•	•	•
Team Coaching	•	•	•	•	•	•	•
Change Management	•	•	•	•	•	•	•
Strategic Planning	•	•	•	•	•	•	•
Process Improvement	•	•	•	•	•	•	•
Business Analysis	•	•	•	•	•	•	•
Project/Program Management	•	•	•	•	•	•	•
Quality Management	•	•	•	•	•	•	•
Education							
Bachelor's	•	•	•	•	•	•	•
Master's	•	•	•	-	•	•	•
Relevant Certifications							
PMP	-	•	•	-	-	•	-
ITIL	-	•	-	-	-	-	-
Scrum Master	-	•	•	-	•	-	-
Certified Public Accountant	-	-	-	•	-	-	-
Lean/Six Sigma	-	•	-	-	-	-	-
Years of Experience							
Military or Government	20	18	-	-	-	20	-
Industry	25	5	19	35	20	6	30

Figure 2: Our staff members bring experience and qualifications to meet all DES customer needs.

We combine our experienced Staffing Team with the resources of our teaming partner to provide DES customers with high-performing cleared professionals throughout this effort. Our approach was proven for eight years supporting a federal government customer and on over 50

Collectively, we reduce DES's risks by deploying a highly skilled and experienced team, a comprehensive set of services, and operational excellence based on CMMI and ISO quality benchmarks.

tasks orders with another federal government customer all with very diverse staffing requirements. Additionally, our teaming partner has 37 years' experience supporting state government agencies like DES, getting its start as a talent provider supporting the public sector. As seen in Figure 3, we have used our staffing approach to effectively staff at 100% with a 99.1% retention rate on recent and relevant projects. Our team's history supporting similar customers gives us access to networks of personnel with the skills and clearances necessary to excel for DES. We have extensive experience ensuring our candidates meet or exceed our customer's requirements in a historically competitive recruiting and retention environment. We do this daily on our multiple programs. We incorporate lessons learned to ensure we are sourcing the right candidates.

Project	Duration in Years	Average Staffed %	Total # of Staff	# of Staff Turnover	% Turnover	Retention %
1	7+	100%	18	1	6%	94%
2	5+	100%	7	0	0%	100%
3	7	100%	22	0	0%	100%
4	3	100%	30	0	0%	100%
5	2	100%	5	0	0%	100%
6	8.5	100%	15	0	0%	100%
7	5+	100%	6	0	0%	100%
Average	5.2	100%	14.7	<1	<1%	99.10%

Figure 3: Our proven history of successful employee retention provides stability to DES customers.

We understand what makes employees stay and we give them that. Our PMs understand that, though we operate a business, we manage people with personal concerns such as health issues, family, and financial obligations. We understand the holistic needs of the individual, respect and appreciate their contributions, and treat them accordingly. We actively seek to create opportunities for our employees to expand both their technical and interpersonal skills. Our PMs provide the entire team with their personal contact information and encourage employees to reach out to them with anything at any time.

Our approach offers DES technical competence and mission continuity through low staff turnover. Our turnover rate is 3% across our entire company; the national average is 17.8%.

As demonstrated through our above differentiators, highlighted experience, ability to meet all requirements specified within Exhibit B, and a deep understanding of what it takes to deliver the proposed services to DES, we are well-aligned to support you under a master contract awarded through this competitive solicitation. The following sections of our response continue to emphasize how DES will benefit from our extensive experience and strong capabilities for providing quality services that enhance your agency and helps you continue creating and improving a diverse, equitable, respectful, and inclusive workplace.

Experience (4 pages for each category bid) (200 points)

Project 1 / Reference 1 – Organizational Management

From **2017 to 2018**, our company worked as a subconsultant under a contract that included providing multiple training programs for the client, a global manufacturer of racing and marine engines with offices in the United States and Europe and an annual revenue of \$30 million.

Given the client's reputation for innovation in developing and providing high-performance products within their market, our **goal** was to work with them to help ensure that their **over 150 employees** were equipped to answer the challenges associated with continuing the successful tradition of innovation and performance associated with their brand. The **scope** included a variety of training and coaching methods—including custom content—designed to address key topics and areas necessary for strong leadership and teamwork within the organization.

Actions taken included training provided to the client's staff combined group sessions and one-on-one coaching. Training classes provided to the client's employees included but were not limited to:

- Building High Performing Teams
- Essential Skills for Leaders (Levels I & II)
- Coaching Skills for Leaders
- Communication
- Emotional Intelligence and Business Simulations

One-on-one coaching and training sessions were provided for several of the client's senior staff members. Additionally, the client went beyond only following the initial training courses we offered to them—we also worked with them to develop training tailored to their organizational needs and challenges.

Results: The client was highly pleased with our services and our consultant trainer's ability to work with the client to develop and implement effective training programs. In feedback questionnaires asking the client to rate our performance on a scale of 1 to 5 across multiple categories (5 equaling an "outstanding" rating), we were consistently given a rating of 5. Rating categories included:

- Our ability to meet the client's expectations.
- Staff knowledge and expertise.
- How easy the client found it working with us.
- Our ability to complete work on time and on budget.
- Whether the client would consider working with us again.

Our consultant's knowledge, skills, and personable nature when training exceeded the client's expectations, as did our ability to quickly and peacefully resolve any issues that arose during the engagement. In fact, the client was so impressed with the consultant we placed to provide the course training that following project completion, they have sought additional opportunities to partner with us.

Project 2 / Reference 2 – Organizational Management

From **2015 to 2019**, we performed organizational management and training services for a Midwestern organization of **20 employees** who provide a range of professional testing services for the aerospace, industrial, consumer, and energy industries across the East Coast and Central United States.

Our **scope** for this project primarily consisted of developing a university concept for the client supporting leadership development. However, throughout the project, we needed to do more than just assemble a series of courses and programs pertaining to leadership—our **goal** was to also ensure the program addressed topics and challenges relevant to leaders in an organization offering highly specialized technical services. As a **result**, the client's organizational culture of quality, responsibility, and integrity was a focus, especially when considering how their products and services contribute to their own customers' product safety, accuracy, and reliability.

These multiple levels of responsibility and accountability that our client faced required more than just employee training through a stock set of classes. Because of this, **actions taken** for this project not only included the leadership university concept we provided to this client, but also providing additional course-based training to client's employees on an as-needed basis.

Results: The as-needed training combined with the leadership university concept helped to provide integrated coaching for teams, leading to short-term wins and self-sufficiency in building strong leadership and teamwork efforts within the client's organization. It also provided a foundation and framework they could use to continue making incremental improvements, extending the educational value beyond the immediate period where our consultant trainer worked directly with the client.

This client was highly pleased with our services and the results; in feedback questionnaires asking them to rate our performance on a scale of 1 to 5 across multiple categories (5 equaling an "outstanding" rating), we were consistently given a rating of 5. Rating categories included:

- Our ability to meet the client's expectations.
- Staff knowledge and expertise.
- How easy the client found it working with us.
- Our ability to complete work on time and on budget.
- Whether the client would consider working with us again.

Project 1 / Reference 1 – Change Management

Our company worked on a large project to retire an antiquated accounting system for a federal government customer with over **12,000 employees**. This project required our customer's organization to completely change the way it collected and processed fees. The legacy system was over 20 years old and, while outdated, was familiar to both internal and external users. As a result, our team faced various levels of pushback throughout the redesign process.

Spanning seven years (2012-2019), the **scope** of our effort was to develop and implement the strategies and tools to accomplish the **goal** of completely retiring the legacy system and creating a modernized, secure system that our client could use to process fees and payments. Despite the challenges, our **results** were that we addressed our customer's concerns and delivered a system that was able to:

- Process various payments and refunds.
- Work with existing internal and external systems.
- Create a new user tool that adhered to design standards and compliance guidelines for the disabled.
- Achieve over 99.9% availability.
- Make the system Cloud-ready.

DES benefits from this by having a team experienced in supporting a large organization through significant transformational change.

Capabilities in Action: *I naturally think in terms of business value to our external customers and our internal customers. It is wonderful how the team is questioning stale and inefficient practices and replacing them with modern eCommerce concepts. Because of you this project is a total rethinking of how we do business.*

- Chief Financial Officer, Federal Government Customer

The following paragraphs detail our **actions taken** to achieve our client's goals.

Strategic Planning: Our PM, senior engineer, and the customer's senior leadership jointly planned the program's vision, release plans and sprints. Once the vision and the major features were assigned to the release plans, this group continued to meet to plan the next major release. This enabled the team to identify risks and impacts and make the necessary adjustments to maintain the teams' pace of production. Our PM oversaw the overall program, addressing areas of challenge as needed. The senior engineer oversaw the technological aspects of implementation.

Communications Plan: After plans/schedules had been put in place, we executed each project component by identifying the right mix of people and skills, empowering leadership to make timely decisions, and keeping open and clear communication within the team and the stakeholders to deliver results. We maintained a close working relationship with our customer's stakeholders.

Informal meetings enabled our team to quickly identify and resolve potential issues before occurrence and developed trust between all parties. Our PM conducted formal Program Management Reviews (PMR) and Technical Interchange Meetings (TIM) with our customer at regular intervals. To facilitate meetings, our team prepared meeting agendas, presentation materials, and meeting minutes to

maintain a summary of meeting action items. In addition to establishing close working relationships, these meetings assisted our team in quickly summarizing status, coordinating actions requiring Client support, providing management assessment data, resolving program-related issues, and mitigating program risks.

Process Improvement: Throughout the duration of the project, our PM monitored work quality and associated deliverables, reviewed performance metrics, and sought feedback from the Client to ensure our final product met customer expectations, making changes as needed. When changes were required, the PM investigated any variance from the plan to identify the root cause and initiated/monitored/evaluated corrective actions with full knowledge and buy-in from the team and stakeholders. We addressed concerns and removed roadblocks by ensuring that stakeholders were reminded of the need for the change and its associated benefits (i.e., a more secure system to process credit cards, the ability to process refunds and payments more efficiently, improved tools to allow employees to work faster, the ability to create reports, etc.).

The legacy system was completely retired and replaced by a modernized, secure system that the Client could use to process fees and payments. Additional goals of the redesign were to make the payment process more efficient, reduce processing time, support telework and remote collaboration, and produce high quality decisions – all in a faster and more cost-effective way. Our solution reduced paperwork processing time by 68%. Because the system was Cloud-ready, telework and remote collaboration were supported. This was confirmed before product delivery, but further confirmed during the COVID-19 pandemic when telework became a mandate rather than an optional benefit for the organization's 12,000+ employees.

Project 2 / Reference 2 - Change Management

Since 2014, our company has worked on a project to develop and support improvements to critical research and analytic processes and tools for one of the world's largest research-based biopharmaceutical companies with over **10,000 users in 38 countries**. The **scope** of our effort is to develop and implement the strategies and tools to accomplish the **goal** of creating a platform and associated processes for researchers to share and collaborate on research, tools, and analysis without installing tools or software locally. To date we have achieved the following **results**:

- Re-engineered dozens of critical business processes.
- Worked with our client to implement a centralized operations system to increase collaboration.
- Worked with our client to develop and implement ten custom tools to optimize workflows.
- Created a cost-efficient shared services model that enables utilization by multiple divisions within our customer's organization to eliminate redundant processes and tools.

Additionally, we lead the effort to improve our customer's project management and development processes throughout the organization and utilize iterative methodologies to quickly deliver high-quality improvements. We are currently coaching our customer through the implementation of a formal Systems Development Life Cycle (SDLC).

Our efforts contributed to our client's ability to be on the leading edge of COVID-19 vaccination and treatment development.

DES benefits from this by having a team experienced in supporting a large organization through significant change and experienced in advancing a collaborative approach that is adaptable to meet the needs of a wide array of users.

Your company has brought the expertise and practices to help us develop a culture of excellence.... Your company took the initiative to drive and implement these formal processes, and it has made a tremendous difference in quality. You have also implemented Systems Development Life Cycle processes to improve day-to-day project management.

- Chief Executive Officer, Commercial Customer

The following paragraphs detail our **actions taken** to achieve our client's goals.

Strategic Planning: To enable our customer to set realistic goals and objectives, we follow the change management approach shown in Figure 4. Within this approach, we assist our customer to define their strategy and direction, and we support their resource allocation decisions for the changes.

Process Improvement: Our program is considered the "Gold Standard" across our customer's enterprise. All our efforts meet International Organization for Standardization (ISO) 9001:2015 and Capability Maturity Model Integration (CMMI) Level 3 standards. We codify our approach within a Project Management Plan that details how our management processes fully integrate, manage, control, and document all phases of each project. We use data heavily in our program management process to continuously improve efficiency, quality, velocity, and most of all customer satisfaction.



Figure 4: Our change management approach applied the five stages of strategic planning to ensure a successful change process for our customer.

We create dashboards to provide real-time metrics and tools to determine trends. This provides full transparency for our customer. We use system tools designed to manage and standardize program management processes. We track and control every project detail. Our management focuses on the customer base and monitoring the project pipeline; tracking and reporting project costs, chargebacks, and work orders; and monitoring and reporting on compliance with service level agreements. Our PM manages cost estimation and charge-back tasks to ensure the cost allocations are correct for both current and prospective internal customers. We seek out training opportunities on emerging processes and technologies to ensure we bring the latest capabilities to bear for our customer.

Because of our sustained excellent performance, we are the “go to” team for any efforts that require management or technical improvements. For example, we were recently hand-picked to fix a project being run by an underperforming vendor. This vendor spent over four years in development and was over a year late in delivering the solution. Ultimately, we implemented formal management processes and delivered the new application and process improvements in five months with zero defects and were able to pass the critical Government validation process our client must complete.

Project 1 / Reference 1 – Management and Business Analysis

From **2011 to 2017**, our company worked on a project for a federal government customer with over **3,800 employees** and an annual budget of almost **\$2 billion**. The **scope** of our project was to develop and implement a performance-based life cycle support system to completely transform how our customer maintained the hundreds of radar systems they acquire and sustain for decades. Our **goals** were to work with our customer to implement a performance-based data-driven system and reduce sustainment costs. The **results** we achieved were:

- Re-engineered over 400 business processes to become performance-based and data-driven.
- Our operational and management process implementations led to over \$16 million in annual sustainment cost savings.
- Our systems analysis efforts identified and corrected over three thousand documentation errors that led to downstream issues for radar system technicians.
- Our business recommendations led to a 90% reduction in configuration status accounting errors.

The following paragraphs detail our **actions taken** to achieve our client's goals.

For over eight years, we developed and implemented a performance-based life cycle support system that revolutionized our customer's **business processes**. The **business analysis** approach we implemented was shaped by the unique problem faced by our customer. We considered what was known about the need at the time of planning, while acknowledging our understanding would evolve throughout our activities. Our governance approach identified the stakeholders who had the responsibility and authority to make decisions about our work including, who was responsible for setting priorities, and who would approve changes. Our approach also defined the processes that we utilized to manage requirement and design changes across the initiative. Our business analysis change management process aligned with our customer's change management workflows.

Key to our approach was stakeholder engagement. We planned stakeholder engagement to establish and maintain effective working relationships. We conducted a thorough **stakeholder analysis** to identify all the involved stakeholders and analyze their characteristics. We used the analysis results to define the best collaboration and communication approaches for the initiatives. We conducted hundreds of information gathering sessions with stakeholders to capture business processes and document **requirements**. To gain further insight, we participated in various working groups and meetings to understand the data and process needs to monitor and analyze system test events, sustainment support, and operational readiness. Among these working groups and meetings were: Test Readiness Reviews, In-Process Reviews, Integrated Product Teams (IPT), Integrated Logistics Support Management Team, Training Working Group, regular weekly program status meetings and planning sessions, and Configuration Control Boards. Within these working sessions and meetings, we used requirements gathering methods such as casual discussions, user interviews, direct observations, hierarchical task analysis, and goal directed task analysis.

We modeled over 400 business processes and captured data using the Systems Modeling Language and IBM's Rational Rhapsody modeling tool. Our process models defined our customer's workflows, identified the data required by the workflows, and defined the requirements for automated tools to

implement the processes. We defined and documented all functional, performance, and interface **requirements** for Total Life Cycle Systems Management. Within our process models we defined the current state and worked from our requirements analysis to define the future state, and determine the activities required to move our customer from the current to the future state. We helped our customer identify over twenty critical business processes that required significant tooling improvements to meet their goals.

We directly supported **program development** by conducting process analysis on in-service systems to drive management decisions and activities. Our analysts evaluated failure and supply data for in-service systems. For example:

- For one radar system, our analysis reduced maintenance costs by revealing that Electron Tubes were being replaced prior to failure. This resulted in a \$7 M (39%) reduction in the total maintenance cost.
- For one radar system our analysis reduced sustainment costs by revealing \$1.6 M worth of repair parts that were being stocked and never used.

During our effort, we were requested by our customer to be the configuration **change management** lead for their largest radar system. In this role, we developed and documented an improved Engineering Change Proposal process and instruction that was implemented across our customer's enterprise. Our improved process led to a 90% reduction in configuration status accounting errors.

We maintained cost control throughout the effort, as noted in the Contractor Performance Assessment Reports (CPAR). We completed our work 19.2% under the original award ceiling. Our products and services were consistently evaluated as exceeding the expectations of our customer. Our process models consistently received accolades from key leaders within our customer's organization. Our customer's Chief of Logistics routinely requested us to brief our models to stakeholders in and out of their organization to educate staff on "the direction of their sustainment efforts."

Project 2 / Reference 2 - Management and Business Analysis

Since 2014, our company has worked on a project to develop and support improvements to critical research and analytic processes and tools for one of the world's largest research-based biopharmaceutical companies with over **10,000 employees in 38 countries**. The **scope** of our effort is to develop and implement the strategies and tools to accomplish the **goal** of creating a platform and associated processes for researchers to share and collaborate on research, tools, and analysis without installing tools or software locally. To date we have achieved the following **results**:

- Re-engineered dozens of critical business processes.
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- Worked with our client to develop and implement ten custom tools to optimize workflows.
- Created a cost-efficient shared services model that enables utilization by multiple divisions within our customer's organization to eliminate redundant processes and tools.

Additionally, ***we lead the effort to improve our customer's project management and development processes*** throughout the organization. We are currently coaching our customer through the implementation of a formal Systems Development Life Cycle (SDLC).

DES benefits from this by having a team experienced in supporting a large organization through significant change and experienced in advancing a collaborative approach that is adaptable to meet the needs of a wide array of users.

The following paragraphs detail our **actions taken** to achieve our client's goals.

Before investing in a new tool or re-engineering a business process, we work with our customer to define their needs, justification, and desired outcome. Without conducting this crucial process, our customer may waste time and money for solutions which do not solve their problems or provide less than their desired outcome. Our Business Analysts (BA) work with our customer **stakeholders** to define the needs and justification that serve as the foundation of the solution design, development, implementation, operations, and maintenance. Our **business analysis** processes enable our customer to articulate their needs and the rationale for change, and to design solutions that deliver value.

We have conducted business analysis on a variety of initiatives and will do the same for DES. These initiatives have been strategic, tactical, and operational. For our customer, we perform business analysis within the boundaries of each project and throughout enterprise evolution and continuous improvement. We utilize our business analysis processes to understand the current state, to define the future state, and to determine the activities required to move from the current to the future state. As seen in Figure 5, our business analysis approach aligns the Business Analysis Body of Knowledge (BABOK) areas to our customer's Systems Development Life Cycle (SDLC) Phases.

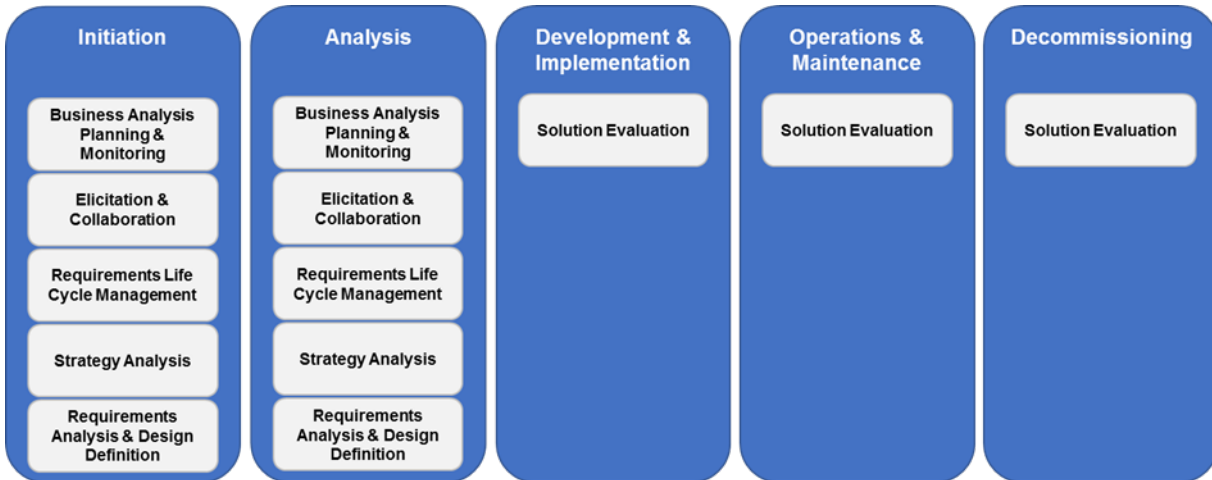


Figure 5: We apply BABOK knowledge areas across our customer's SDLC Framework to support all business analysis requirements.

Following a user centered design process, our team works with customer representatives to define, refine, and ***maintain requirements*** over ongoing discovery sessions using techniques such as observations, brainstorming, interviews, requirements workshops, and prototyping. Ultimately, we document requirements in a Systems Requirements Specification, and we maintain bi-directional traceability between customer requirements, test scenarios, and documentation via a Requirements Traceability Matrix (RTM).

Our ***project management*** efforts build upon the foundation laid during project planning and are led by our PMP certified staff. Our efforts provide visibility into key project metrics to enable timely management decisions and treatability for efficient requirements review. To begin, all documented estimates, commitments, and plans created during the project planning and requirements analysis are version controlled as the baseline from which we manage and assess project performance. A fundamental goal of our project management efforts is to seek global optimization across all projects. We do this through close coordination between our team and the project teams. This approach is necessary, so we avoid sub-optimization, or doing something that makes one part of the system more effective while making other parts of the system less effective.

We provide independent oversight and ***quality monitoring*** through a variety of quality management methods. We work closely with our customer to coordinate quality monitoring activities such as site visits, code reviews, and design reviews. When evaluating software products, we utilize the ***RTM*** created during ***requirements analysis*** to verify traceability from requirements through test results. This ensures that the agreed upon requirements are being met by the project team.

We coordinate and plan meetings when needed to accomplish goals such as root cause analysis, obtain client feedback, conduct program management reviews, or conduct walk-throughs and design reviews.

Quality Assurance (4 pages maximum) (150 points)

Quality Team Organization

We organize our team and develop our work processes to deliver a quality result each time. Understanding that people may make mistakes, we foster a culture of addressing problems early and quickly so small problems do not become larger ones. While our PM is responsible for identifying problems as quickly as possible based on metrics, our Quality Control Team (Figure 6) provides a second layer of oversight. Our processes were proven in our work with one customer for whom we modeled over 400 processes to reduce life cycle costs and improve systems availability for the systems they acquire and maintain.

Our quality management system is certified to ISO 9001:2015 standards (Registration: USA100001 Quality Manager 55) and our development practices are externally assessed at CMMI

Development Level III standards (Appraisal: 32635). Our organizational commitment to quality through adherence to these management frameworks empowers our team with the right processes, tools, and oversight to ensure quality outcomes for DES master contract customers.

We have codified the following processes at the corporate level: Proposal Management, Project Management, Process Management, Organizational Training, Measurement Analysis, Management Review, Internal Audit, Design, Decision Analysis Resolution (DAR), Control of Records, Control of Documents, Configuration Management, Coding and Unit Testing, and Build and Release Process.

From these processes we have version-controlled templates that we use to create project specific plans. This enables efficient creation of documents that govern our management practices, so we are not creating something entirely new with each task order. Instead, we are tailoring processes to the task order's specific needs. We are constantly evaluating the effectiveness of our processes through our Systems Engineering Process Group (SEPG). This team is comprised of some of our senior staff members with a primary mission of continuous process improvement. The SEPG evaluates metrics captured from all our projects monthly, along with process improvement suggestions from our staff to determine where changes are needed. If a corporate process is changed, then each task level project manager evaluates how that change affects his or her project and revises project specific plans, as necessary. For example, the SEPG introduced a peer review checklist which resulted in a higher level of quality after determining peer reviews were haphazard and unfocused. The checklist is now included in the Project

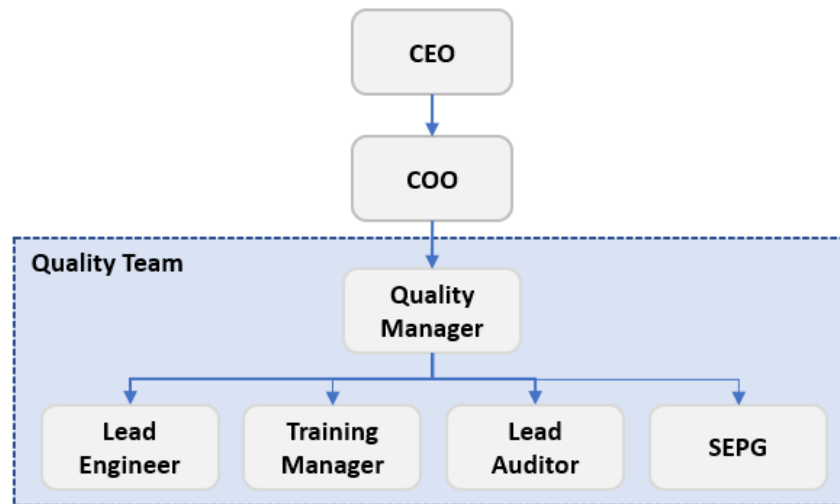


Figure 6: Our Quality Team supports our staff to ensure high quality services with first time success.

Management Plan and is a part of all our development projects. We will use the same process improvement approach for DES customers. Our Quality Management System (QMS) verifies and maintains the desired level of quality in our products and services by careful planning, using proper equipment/processes and continued inspection and corrective action as required. Our Quality Team is an independent part of our company not associated with any other company administrative or operational division and works directly for our Chief Operating Officer (COO). Our Quality Team organization and integration is detailed in Figure 8. The primary interface occurs between our Quality Manager and our PM. Our Quality Manager works with the PM to schedule activities to ensure they have a minimal impact to the project schedule.

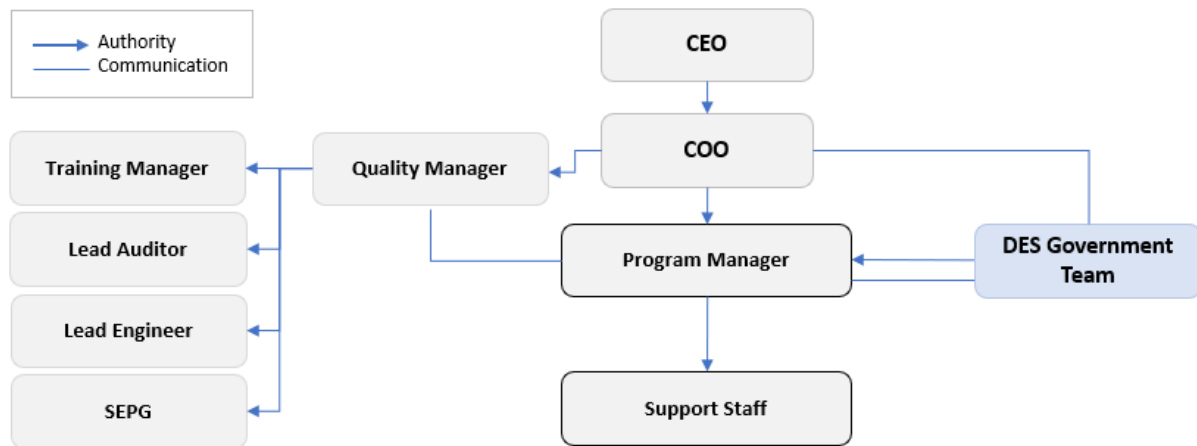


Figure 7: Our quality control team directly supports our project team to ensure consistent, high quality results.

Quality Assurance Process Summary

Inspection Methodology: In accordance with ISO 2859, we conduct inspection activities such as measuring, examining, testing, or gauging one or more characteristics of our products or services and compare the results with specified requirements to establish whether conformity is achieved for each characteristic. Because of this, our quality processes begin with the statement of work defined criteria and standards. We employ the following quality control methods:

- Customer Feedback
- Random Sampling
- Vertical and Horizontal Audit
- Design Checks and Reviews
- Technical Reviews

Where possible, our Quality Team uses configuration-controlled checklists as a guide to ensure thorough evaluation of the product or service. These checklists are customized for each project to ensure the checklist accurately evaluates the approved requirements and standards.

Documentation: Documentation is critical to keeping track of what happened, why it happened, and how to ensure it does not happen again. All nonconformities or deviations from project metrics are formally recorded.

Schedule: On an annual basis our Quality Manager works with our PMs to develop a Quality Control schedule that details the quality control activities for each project and our corporate operations. The schedule details the quality control activities, scope, and participants and is updated by the Quality Manager on a quarterly basis or project scope/requirements change.

Assessment Methodology: Upon completion of any quality control activity, the lead auditor briefs our PM on the findings. The lead auditor also records all data collected into a common quality control database used for detailed analysis of key control parameters for both specific projects and across all our operations. For example, the data about scope, schedule, and cost can be calculated and used to derive project performance baselines. The PM can then track project metrics with upper and lower controls. These metrics include planned value versus earned value, cost variance, schedule variance and quality metrics such as the number of change requests or the number of errors made. Together the PM and Quality Manager use these results along with trend analysis to conduct root cause analysis on non-conformities or variations.

Corrective Procedures: Once a root cause has been determined, the PM works with the cognizant project team member to identify action(s) to be taken and whether they are corrective, preventive, or both. Each non-conformity is prescribed an appropriate action that is tracked in our quality control database through completion and subsequent evaluation of the action's effectiveness. Corrective actions are taken to eliminate the cause of a detected non-conformity or another undesirable situation. Preventive actions are taken to prevent the occurrence of a potential non-conformity or other undesirable situation.

Follow-up Procedures: We review corrective and preventive actions for all non-conforming conditions for effectiveness during the subsequent audit or event in which they were found. A key input to the audit/inspection process are the results of any previous audit or inspection. If the non-conformance continues, it is escalated to our Quality Manager for immediate action.

Personnel Resources

To ensure we provide first time quality to our customers, we begin by employing highly capable personnel. Figure 8 provides an overview of the capabilities of some of our staff members.

	Consultant						
	A	B	C	D	E	F	G
Key Skills							
Organizational Development	•	•	•	•	•	•	-
Executive Coaching	•	•	•	•	•	•	•
Team Coaching	•	•	•	•	•	•	•
Change Management	•	•	•	•	•	•	•
Strategic Planning	•	•	•	•	•	•	•
Process Improvement	•	•	•	•	•	•	•
Business Analysis	•	•	•	•	•	•	•
Project/Program Management	•	•	•	•	•	•	•
Quality Management	•	•	•	•	•	•	•

Education							
Bachelor's	•	•	•	•	•	•	•
Master's	•	•	•	-	•	•	•
Relevant Certifications							
PMP	-	•	•	-	-	•	-
ITIL	-	•	-	-	-	-	-
Scrum Master	-	•	•	-	•	-	-
Certified Public Accountant	-	-	-	•	-	-	-
Lean/Six Sigma	-	•	-	-	-	-	-
Years of Experience							
Military or Government	20	18	-	-	-	20	-
Industry	25	5	19	35	20	6	30

Figure 8: Our consultants bring decades of experience, combined with a plethora of degrees and professional certifications to meet any DES needs.

Employee Training: We offer training to ensure each employee meets all ongoing certification requirements and provide training opportunities in current professional services standards, methods, and tools to sharpen staff skills and focus on their professional growth. Our corporate training program starts with understanding our employees and setting a vision for their continued improvement. To develop and maintain a complete understanding of every individuals' capabilities, credentials, and professional aspirations, we conduct annual Career Planning Boards. Career Planning Boards offer our employees and managers a forum to thoroughly explore all facets of an individual's career path and to develop a plan for continued employee growth and improved performance. The output of each Career Planning Board is an individualized Employee Career Plan. We use these Employee Career Plans, along with our company vision, strategy and customer needs to create an annual Corporate Training Plan.

At the project level, we assess individual skills and qualifications versus project needs. Quarterly, our PM and our Corporate Training Manager perform a skill gap analysis to identify any skill, qualification, or certification gaps we have or may have in the future. These gaps help structure training and certifications to ensure our team always meets skill, qualification, and certification requirements. As project parameters change, we evaluate the training, certification, and qualification effects the new requirements bring. From there, we modify our training plan to address any newly identified needs. Finally, we maintain a corporate knowledge repository of all project documents. This repository ensures all best practices, lessons learned, and customer feedback is saved to a central location. Before placing any person on a project, we ensure the individuals have read through all pertinent documents and that they are knowledgeable about the state of the project.

Qualifications Essay (8 pages maximum) (200 points)

How we meet the minimum qualifications described in Exhibit B – Performance Requirements and how our experience and qualifications will enable us to provide quality services to customers of the DES Master Contract.

Our **company principal** and Chief Executive Officer (CEO) brings over 30 years of business experience backed by a 20-year Navy career. He possesses a Bachelor of Science (BS) in Business Administration and a Master of Business Administration (MBA). Since founding our company in 1980, our principal was directly responsible for the design, development, and implementation of numerous highly innovative and effective business processes for major federal customers. Our CEO is directly supported by our other executive leadership team members including our:

Chief Operating Officer

- 18 years of Navy service
- 5 years in industry
- BS Civil Engineering
- MS Management
- PMP
- Lean Six Sigma Certificate
- ITIL Foundation v4
- Scrum Master

Chief Experience Officer

- 19 years in industry
- BS Economics
- MBA
- PMP
- Scrum Master

Chief Financial Officer

- 35 years in industry
- BS Business
- Certified Public Accountant

In addition to our executive leaders, we have a deeply talented and capable team. Some examples of our team members are captured in Figure 9. Each of our professionals has two primary credentials, outstanding specialized expertise in the markets we serve, and superior client relation skills. Our ability to develop close working relationships with all project stakeholders enables us to quickly solve problems, reduce project costs, and complete the project as efficiently as possible.

	Consultant						
	A	B	C	D	E	F	G
Key Skills							
Organizational Development	•	•	•	•	•	•	-
Executive Coaching	•	•	•	•	•	•	•
Team Coaching	•	•	•	•	•	•	•
Change Management	•	•	•	•	•	•	•
Strategic Planning	•	•	•	•	•	•	•
Process Improvement	•	•	•	•	•	•	•
Business Analysis	•	•	•	•	•	•	•
Project/Program Management	•	•	•	•	•	•	•
Quality Management	•	•	•	•	•	•	•
Education							
Bachelor's	•	•	•	•	•	•	•
Master's	•	•	•	-	•	•	•
Relevant Certifications							
PMP	-	•	•	-	-	•	-
ITIL	-	•	-	-	-	-	-

Scrum Master	-	●	●	-	●	-	-
Certified Public Accountant	-	-	-	●	-	-	-
Lean/Six Sigma	-	●	-	-	-	-	-
Years of Experience							
Military or Government	20	18	-	-	-	20	-
Industry	25	5	19	35	20	6	30

Figure 9: Unlocking your full potential requires the 3 E's: Education, Experience, and Excellence. Our highly credentialed team stands ready to assist DES.

Alongside our own capable in-house team, our teaming partner also has a committed team designed to address DES' account needs. In addition to segmenting their teams by industry (i.e., Government Services), they also segment their teams by technical specialty. Combined with a nationwide talent network and a just-in-time recruiting strategy that quickly matches you with talent meeting your specific needs, this approach lets them filter your personnel requirements directly to a team of recruitment professionals with deep insight into the skill sets and capabilities in your position requirements.

Our partner requires its account teams in each of these practices to attend trainings and certification courses specific to their technical segmentation. As a result of this team structure, these teams build deeper candidate pipelines, deeper relationships with professional talent, and can speak in greater depth with the clients' hiring managers. These recruiters are not trained to just look for "buzz words"; they are trained to know what to look for in a professional who will succeed at DES.

Details of how our experience and qualifications enable us to provide quality services to customers of the DES Master Contract.

Since 1980, we have brought a passion for innovation and a commitment to integrity to every project we have taken on. It is always our priority to build lasting relationships with our clients and to act as their advocate. Our sample project experience (Figure 10) shows that our **company qualifications** far exceed those needed to serve customers of the DES Master contract.

	Sample Project Experience (years)					Total Sample Project Experience
	1	2	3	4	5	
Organizational Development	-	-	-	1	4	5 years
Change Management	8.5	7	8			23.5 years
Management/Business Analysis	8.5	7	8			23.5 years

Figure 10: Our track record for success shows that our **company qualifications** far exceed those needed to serve customers of the DES Master contract.

Organizational Development

Given our deep knowledge of organizational development, our leadership recognizes that happy and engaged employees create positive outcomes for the customer. In short, we walk the walk. While we have helped other organizations reach their goals, we also apply those same principles in our own company. We have been in business for over 40 years and are continuing to evolve. Every organization faces change, including ours. We understand how the resistance to change feels and have overcome similar obstacles by building an environment that demonstrates trust and care.

Our organization employs a Chief Experience Officer (CXO). This individual oversees all areas of the customer experience as well as the employee experience. In our company, we transform the data we collect from our own employee surveys and discussions into actionable solutions. This includes amplifying employee purpose and engagement and delivering a seamless workplace experience that addresses both the employees' business-related and personal needs. Not surprisingly, our company enjoys a higher than industry average retention rate. We have celebrated 10-year employment anniversaries with over 38% of our employees and look forward to future celebrations as that number continues to grow.

All our managers have been trained to elicit the very best from their teams. For example, our managers facilitate lunch and learns in which employees can sit with their peers and freely discuss any challenges or issues they encounter. In a zero-pressure environment filled with laughter and food, team members learn from each other, exchange ideas, and determine areas of improvement. Team members look forward to those meetings and report feeling relaxed and excited to return to their work.

Another key factor in our organizational development strategy is equipping our internal employees and consultants to not only excel in their current positions, but also continue growing and exploring within their careers. This also applies to our teaming partner; whose employees collectively receive approximately 100,000 annual hours of training to enhance current skills and learn new ones. This benefits DES by allowing us to place talent with you who wants to work for you, not just placing talent who happens to meet skill requirements. Conversations surrounding career goals are part of our consultant screening process, helping us understand where a candidate wants to go in their careers and whether a position will help them get there.

Our partner also provides a wide range of skill development training to our internal employees and our temporary consultants to help them develop their skills. This includes classroom-based training, over 6,500 technical- and business-focused online courses, and on-the-job reinforcement programs. Training topics vary from foundational role training to advanced skill development, to management and leadership training.

Organizational development through expectation management and consistent feedback: We manage our client expectations through our flexibility and responsiveness, and we stay connected to our clients through our constant communication model. We will conduct touchpoints with our staff, consultants, and clients to discuss any issues, and respond and fulfill your needs accordingly. This includes the following touchpoints:

- **First Day/Week Follow-Up:** The recruiter or account manager calls the consultant to inquire about his/her first day. A week after the employee is placed, the account manager will follow up with the hiring manager and consultant to verify their level of satisfaction.
- **30-Day Evaluation:** Approximately 30 days into each assignment, your account manager meets with you to evaluate our consultant's performance. We elicit feedback to understand if your needs are being met and to gain an even deeper understanding of the consultant's strengths and weaknesses for future reference.
- **Service Days:** Our offices dedicate the third Thursday of every month as a Service Day to seek in-depth feedback from clients and consultants about their placements and to provide feedback

from hiring managers. This serves as another opportunity to coach consultants and to further refine the relationships between us, DES, and the consultants.

- **Informal Evaluations:** Our account managers frequently interact with consultants over the course of an assignment through paycheck delivery, monthly luncheons, phone calls or site visits.
- **45-Day Process:** Forty-five days before a scheduled finish date, your account manager contacts you to discuss project continuation or completion. The account manager may ask performance questions to determine the consultant's abilities and the hiring manager's interest in the consultant for future projects. We also ask if you would recommend any new skills training for the consultant.
- **Exit Reference:** Once the project is complete, your account manager schedules a call or visit with the hiring manager to assess our consultant's overall contribution to the project and team. This is a learning opportunity for us to better understand your expectations and priorities.

Change Management

Change happens. Our experience has taught us that how we manage change determines the success of our response. Factors like evolving market conditions, new competitors, and new technologies only add urgency. Failure to change allows more nimble competitors to get ahead. Planning for change and making it part of your culture makes it easier to adapt and stay competitive and agile. We prefer the comfort of our routines. This preference can make it difficult to change. As a result, even the most inspired business leaders in companies of every size face a path full of potential roadblocks when proposing a change. We offer a proven change management process that overcomes these challenges. We start creating positive change by overcoming the three most common problems that stop it cold.

— Employee Resistance

Few of us like change and while that is normal, a business must evolve to remain agile and competitive. Resistance to change can start anywhere in an organization. Executives may not want to spend money. Departments may not recognize broader organizational needs if their system works. The result? Key stakeholders and decision-makers may not immediately see how the changes will benefit the organization holistically.

Further resistance can come from a change in the routine. Employees may worry about what might happen to their role and their job. Even after the change, employees may still resist if they feel new workflows make their jobs harder. We bring a multifaceted approach to overcome this hurdle.

We are transparent. Workers want to know the reason for the change, not just the high-level benefits it will provide. Acknowledging problems and explaining how this change will solve them can build buy-in and cooperation.

We provide ample training. An effective training program for new technology, workflows, and processes is vital for a smooth transition.

We get management and executives involved. Employees want to see leadership engaged and invested in the effort. When executives get involved, it shows that a clear plan is in place. It also improves communication and makes it easier for both managers and executives to respond to employee concerns.

– **Communication Issues**

Communication deserves extra attention. It is the area where many organizations stumble. Many businesses communicate value to their customers clearly, but they often struggle with internal communication with employees. Common communication downfalls include:

- Limited, or too little, communication
- Not enough channels of communication (i.e., email, in meetings, website)
- Failure to keep all stakeholders informed and involved in follow-ups.

Our change management plans ensure clear, consistent communication across all channels to engage in a constructive conversation between staff and management. Our communications also include essential details. We tell people when events will happen and what to expect. We ensure successfully communicate the correct information. We prevent communication issues through advanced planning. We make a communication strategy part of the change management plan. We detail who will do what. We determine a schedule ahead of time that includes the channels we will use, such as email, intranet, or mail. Most of all, we never forget the value of in-person communication through meetings and impromptu conversations. We give employees avenues to share their concerns and we address those concerns regularly.

– **Implementing New Technologies**

Few changes cause as many headaches for people at all levels of an organization as implementing new technology. New equipment, tools, and workflows change the way everyone works. Without a well-directed plan, the disruption can significantly decrease productivity instead of increasing it, leading to frustration. This can happen even if the new technology automates systems and workflows to require fewer steps and simplify the workload.

Often, situations like this occur because of a need or desire to get new technologies up and running fast, reducing training and transition time. Our experience has taught us that phased rollouts work best. By introducing new technologies over weeks or months, we can overcome this issue. We also avoid the 70% failure rate of change management initiatives (according to Harvard Business Review). Plus, building in extra time allows for testing and to address deployment issues - these often only present themselves during "live" implementation.

To make the most of training, we offer multiple training opportunities. Ideally, we avoid one-off training sessions that speed through how it all works. Instead, we plan for several sessions and provide opportunities for employees to attend more than one. This approach empowers employees to become comfortable with new equipment and processes.

Change can be hard, but it is inevitable. It can also be a key catalyst for growth and staying competitive. We know. We help our customers make big changes all the time. Sometimes, it is as simple as an updating a procedure. Other times, we help customers develop more extensive enterprise-wide change management plans through our consulting services. Some of those details are captured in the following project summaries.

Management and Business Analysis

We help our clients leverage our management and business analysis expertise to achieve their strategic goals by identifying and implementing specific changes. The nature of change can be strategic or structural, sometimes involving changing various policies and processes within an organization to compete better in the market.

– **Our BAs make digital transformation easier.**

Only 19 percent of North American companies consider their technology level to be advanced, yet “85 percent of decision makers believe they have two years to integrate digital initiatives before falling behind their competitors,” per Advance2000. This is why businesses are making digital transformation a top priority.

Digital transformation is complex process, but we can make it simpler. Nearshore Americas, Research and Analysis for the Next Generation of business process outsourcing, referred to business analysts as the glue holding business’ digital transformation together. The source stated, “As digital transformation consumes the corporate world, analytics and information management is key, and business analysts are the vital components in bridging the client-developer gap.”

– **Our BAs translate complex processes during development.**

Once a new business project has been implemented, we help our clients ensure staff across all departments understand the implementation and what it means for the organization. Corporate leaders are not always proficient in communicating these processes to technical staff. This is where we come in.

Our skilled business analysts translate the intricacies about how the business works for the technical staff. Our business analysts also serve as a point of contact during development for quick answers when staff is occupied with the daily needs of their business.

3. Our BAs drive change management.

Implementing a business project is half the battle for corporate leaders. The other half is getting staff to adopt changes that new projects bring. Change management can be a challenge, and our business analysts help ensure staff adapts well to change by acting as change management practitioners.

When changes are not adopted, it is usually because staff members do not understand them and were not prepared for them. Our business analysts do not just help facilitate solutions to problems and create business strategies around those solutions, they also to prepare staff for the changes that are coming, as well as reinforce those changes once they have taken place.

We help our clients understand and determine exactly how their organization works so that their full potential can be realized. We help define of organizational goals and identify strategies the organization needs to follow so they can achieve these goals and objectives.

Experience Summaries

Project 1: From 2011 to 2017, our company worked on a project for a federal government customer with over 3,800 employees and an annual budget of almost \$2 billion. The scope of our project was to develop and implement a performance-based life cycle support system to completely transform how our customer maintained the hundreds of radar systems they acquire and sustain for decades. Our goals

were to work with our customer to implement a performance-based data-driven system and reduce sustainment costs. The results we achieved were:

- Re-engineered over 400 business processes to become performance-based and data-driven.
- Our operational and management process implementations led to over \$16 million in annual sustainment cost savings.
- Our systems analysis efforts identified and corrected over three thousand documentation errors that led to downstream issues for radar system technicians.
- Our business recommendations led to a 90% reduction in configuration status accounting errors.

Project 2: Our company worked on a large project to retire an antiquated accounting system for a federal government customer with over 12,000 employees. This project required the organization to completely change the way it collected and processed fees. The legacy system was over 20 years old and, while outdated, was familiar to both internal and external users. As a result, our team faced various levels of pushback throughout the redesign process. Spanning seven years (2012-2019), the scope of our effort was to develop and implement the strategies and tools to accomplish the goal of completely retiring the legacy system and creating a modernized, secure system that the Client could use to process fees and payments. Despite the challenges, we were able to address our customers' concerns and deliver a system that exceeded our goals.

Project 3: Since 2014, our company has worked on a project to develop and support improvements to critical research and analytic processes and tools for one of the world's largest research-based biopharmaceutical companies with over 10,000 employees in 38 countries. The scope of our effort is to develop and implement the strategies and tools to accomplish the goal of creating a platform and associated processes for researchers to share and collaborate on research, tools, and analysis without installing tools or software locally. To date we have achieved the following results:

- Re-engineered dozens of critical business processes.
- Worked with our client to implement a centralized operations system to increase collaboration.
- Worked with our client to develop and implement ten custom tools to optimize workflows.
- Created a cost-efficient shared services model that enables utilization by multiple divisions within our customer's organization to eliminate redundant processes and tools.

Project 4: From 2017 to 2018, our company worked as a subconsultant under a contract that included providing multiple training programs for the client, a global manufacturer of racing and marine engines with offices in the United States and Europe and an annual revenue of \$30 million.

Given the client's reputation for innovation in developing and providing high-performance products within their market, our goal was to work with them to help ensure that their over 150 employees were equipped to answer the challenges associated with continuing the successful tradition of innovation and performance associated with their brand. The scope included a variety of training and coaching methods—including custom content—designed to address key topics and areas necessary for strong leadership and teamwork within the organization.

One-on-one coaching and training sessions were provided for several of the client's senior staff members. Additionally, the client went beyond only following the initial training courses we offered to them—we also worked with them to develop training tailored to their organizational needs and challenges.

Project 4: From 2015 to 2019, we performed organizational management and training services for a Midwestern organization of 20 employees who provide a range of professional testing services for the aerospace, industrial, consumer, and energy industries across the East Coast and Central United States.

Our scope for this project primarily consisted of developing a university concept for the client supporting leadership development. However, throughout the project, we needed to do more than just assemble a series of courses and programs pertaining to leadership—our goal was to also ensure the program addressed topics and challenges relevant to leaders in an organization offering highly specialized technical services. As a result, the client’s organizational culture of quality, responsibility, and integrity was a focus, especially when considering how their products and services contribute to their own customers’ product safety, accuracy, and reliability.

Our qualifications—including strong references, over 20 years of sample project experience, targeted quality management and assurance processes, and skilled personnel meeting all requirements—position us as an ideal partner for DES’ needs under this competitive solicitation. DES will benefit from our adaptive solutions and processes focused on meeting your end goals, developing your team, and equipping you to effectively address the challenges inherent in creating and maintaining an effective, diverse, inclusive, and competent workforce.

Commitment to Diversity, Equity, and Inclusion (DEI) (2 pages maximum) (150 points)

Our commitment to diversity, equity, and inclusion (DEI) is evident throughout our organization. There is nothing more important to our team than the relationships we have with our employees, clients, and consultants. It is through these connections that we provide unparalleled talent and services solutions. We know we can enrich our relationships even more by integrating DEI into all aspects of our business. By welcoming different perspectives, we can build the best possible teams, develop the best possible ideas, and deliver the best possible outcomes to our clients and consultants.

Some of the ways we demonstrate understanding and follow through on our commitment to DEI in alignment with Exhibit A-3 – Responsible Bidder (Competencies) include:

Local recruiting and collaboration through organizations in Washington State: Diversity will be reflected by recruiting through local recruiting, interface, and collaboration with the following local organizations to fully represent all diverse and geographic populations:

- Trilogy
- LeeHecht Harrison
- Microsoft Software Systems Academy
- Washington Technology Industry Association (WTIA) Institute

We also use technology partnerships with the organizations listed below to provide technology boot camps that help increase our diverse talent pipeline:

- **Year Up:** 100+ placements
- **Per Scholas:** 450+ placements nationwide
- **Creating IT Futures:** 60+ placements
- **Grand Circus:** sponsor Develop(her) boot camp in support of women in IT
- **i.c.stars:** sponsorship of Chicago, Milwaukee, and Columbus locations

DEI-related outreach programs dedicated to providing employment opportunities for veterans: In addition to our own efforts, our subcontractor partner's over 100 offices work with different entities in each of the local markets to find service members for clients like DES. Some of the more common relationships include partnerships at IT academies on base, student veterans' chapters with IT and business focus, guard employment representatives, military transition services such as Skillsbridge, Army Career and Alumni (ACAP), Yellow Ribbon, Navy Warrior Hiring, VFW, Workforce Agency Job Fairs, HiringOurHeroes Job Fairs, and base job fairs. They are also a 2021 Gold Military Friendly® Top 10 Employer and 2020 Military Spouse Friendly® Employer, further demonstrating how they put their commitment into practice.

Their Hiring Heroes campaign a recent, successful outreach effort designed to connect employers with job-seeking veterans. This outreach provides employers with the tools necessary to attract, hire, and retain great veterans in their own organizations. As part of this campaign, we released a downloadable guide, email series, and social media series that guide busy hiring professionals through the current veteran landscape, veteran hiring program best practices, and program strategies in an easy-to-

understand visual narrative. Visitors who download the guide are connected with local members of our Inclusion and Diversity team to provide further support with their veteran hiring needs. To date, this campaign has not only helped employers better focus on their veteran hiring programs but has also resulted in new veteran hires at leading financial institutions, medical institutions, and state agencies.

Recruiter training designed to prioritize DEI: Our workplace thrives on building relationships, fostering open communication, and true partnership with each other, our clients, and consultants. Through our comprehensive program, we conduct onboarding, talent management, ongoing communication, professional development, leadership training, and on-site training for our employee resource groups as well as our workforce. We avoid bias in hiring by training our Recruiters that includes understanding diversity and mitigating the impact of unconscious bias in our sourcing practices.

A corporate focus on DEI: We actively seek to increase our diversity through our sourcing and hiring processes; our DEI corporate strategy and team is fully dedicated to this. Internal DEI-related initiatives practiced by us and/or our subcontractor partner include:

- Employee Resource Groups (ERGs), open to all interested employees, which are representative of historically underrepresented, multicultural, and shared experience groups and serve to address the common interests of participating members. Group members serve as mentors and leaders, pursuing opportunities for community involvement and fostering new relationships with peers, clients, and consultants.
- Community engagement between our team's ERGs and those of our clients to sponsor luncheons, speaker series, and professional development opportunities that not only benefit our internal team but also our consultant and client teams.
- Our subcontractor partner's Executive Inclusion Board (EIB) brings together internal leaders who value DEI. The Board aims to achieve a highly engaged, diverse workforce across all levels, functional areas, and an inclusive culture that embraces and leverages our differences.

Academic and community partnerships putting our DEI initiatives into practice: We develop partnerships with various academic and community associations to build relationships and introduce our organization as an engaging, inclusive place with endless opportunity to build a career. Some of our recent partnerships include:

- Sponsor of Historically Black Colleges and Universities (HBCU) Business Deans Roundtable
- Corporate Partner of FindSpark and Hustle Summit
- National Diversity Case Competition
- National Sales Network Student Sales and Marketing Conference
- Association of Latino Professionals for America Student Symposium
- Sponsoring the Annual Big XII Conference on Black Student Government

Not to Exceed Rates (NTE) (150 points)

Hourly Not to Exceed (NTE) Rates		
NTE Rate for	Maximum Points Available	Quoted Hourly NTE Rate (<i>must provide a rate for both</i>)
Standard Hourly Work Rate	140	\$ 275
Travel to and from worksite(s) if requested and approved by customer (<i>This is only for the employee's salary rate, and does not apply to mileage, airfare, meals, hotels, are per diem</i>)	10	\$ 275

TRAVEL COSTS. Travel wages will only be paid at the behest/discretion of the customer for work performed for and at the Not to Exceed Rate quoted on their bid. Per diem, accommodations, and other related items will only be paid at the behest/discretion of the customer, and in accordance with the [Washington Office of Financial Management's State Administrative & Accounting Manual \(SAAM\), Chapter 10](#).

Return this Bidder Response Sheet to Procurement Coordinator at:
DESContractsTeamCedar@des.wa.gov