

Bidder Name: Integris Performance Advisors

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)

Introduction

We launched this company in 2011 with the mission of "Expanding the existence of healthy organizations and great places to work," and we have been very successful in living up to that vision. To help DES best understand our qualifications, and why we would continue to be an effective and successful partner for the State of Washington, below we list some factors that we believe set us apart.

- **Extreme Customer Focus** – This is something that is hard to prove in writing, but will certainly come out in any conversations you have with our other clients. Our founders/senior executives believe deeply that our company is here first and foremost to serve others. The mantra "we have to give value before we get value" is embraced by all team members.
- **Unparalleled Team of Experts** – Ours is a tight-knit group of learning and development professionals. Each of our coaches and facilitators are career professionals with an average 15-20 years of directly relevant experience. Most have direct experience with WA agencies.
- **Guided By Shared Values** – Trust. Passion. Service. These are the core values that guide our actions and bond every member of our team. This is a difference that is difficult for us to explain in a proposal, but very easy for clients to feel through personal interaction with us.
- **Deep Government Experience** – We serve clients of all kinds, including corporate and non-profit, in addition to government. But an overwhelming percentage of our work is concentrated on government agencies. The broader list of government agencies we've served in a significant way (multi-faceted engagements around organizational development and change management) includes: WA Departments of DES, Ecology, Fish & Wildlife, Lottery, and Licensing; King County; Snohomish County; County of Santa Cruz; Los Angeles County; City of Shoreline; AZ Departments of Revenue, Corrections and Health; the State of MA; and Sacramento Sewer.
- **World-Class Development Programs** – We strive to leverage the brightest minds in the world of leadership development and organizational excellence. That's why our team has built *personal relationships* with some of the most respected people in our industry, including Jim Kouzes and Barry Posner (authors of *The Leadership Challenge*), Patrick Lencioni (author of *The Five Dysfunctions of a Team*), and Brené Brown (author of *Dare to Lead*). Through these relationships, we build our own knowledge and skill, which we in turn pass on to clients.
- **We Practice What We Preach** – We actually apply what we teach to others. For example:
 - We know our DiSC communication styles and we use that knowledge in all our interactions. We actively pursue *productive conflict*, where we leave personal attacks and petty feuds at the door and focus our disagreements on the discussion of ideas.
 - We complete the Five Behaviors of a Cohesive Team assessment several times a year to monitor how we are doing as a team and what we can do to improve.
 - Our leaders complete the DiSC Management assessment, which helps us be most effective in how we delegate, recognize and development our people.
 - We use the LPI 360, which provides insights into how we can better inspire, challenge, enable and encourage our team.
 - We actively apply Lean Six Sigma concepts, doing our best to know our customers' requirements and deliver against them in the most effective and efficient way possible.

Our Story

For years, our founders and many of our current team members focused exclusively on helping clients implement organizational change efforts related to Lean management (including training and certification programs for Six Sigma techniques). During that time we supported hundreds of projects and delivered millions of dollars in savings and revenue gains. But something was missing.

For many executive teams, the decision to pursue Lean was built around the premise that embracing process improvement tools would lead to a shift in organizational culture. Unfortunately, for most organizations, the cultural evolution remained elusive. In far too many cases, organizations were pushing “Lean training” on front line workers, while those in leadership positions gave it little attention.

This was the realization of our founders. They knew the problem wasn’t with the Lean techniques themselves, but rather with how they were being implemented. They knew that if they could help leaders improve their own behaviors, it would open the door for Lean techniques, and really, any organizational change effort, to thrive. So they set out on a multiyear journey to find the best of the best when it comes to leadership and team development.

And so, our company was born!

In our quest, we looked for programs that were based on research and proven to drive results. We combed through a lot, and as we did, a few certainly did rise to the top:

- The Leadership Challenge, based on 30+ years of research about what effective leaders actually do
- The Five Behaviors of a Cohesive team, built around the concepts in one of the most successful business management books of all times, The Five Dysfunctions of a Team
- Everything DiSC, one of the most accurate personality styles instruments available based on the latest research in psychographics and computer adaptive testing

We studied these programs, became Certified in them, and built relationships with the authors and publishers who designed them in an effort to ensure that we could optimize their value as we worked with clients to address issues related to organizational culture, employee engagement, process improvement, and team productivity.

Today we are recognized as one of the top coaching and consulting firms in the world that are Certified by the authors and publishers to help clients embrace these concepts:

- For The Leadership Challenge, we are one of less than 10 firms in the U.S. authorized as a Global Training Partner
- For The Five Behaviors of a Cohesive Team, we are one of fewer than 30 firms that are Certified by the publisher as a Diamond-level provider (the highest honor available)
- For Everything DiSC, we are in the top 1% of DiSC providers globally and we’ve written a best-selling book about how to use DISC in organizational development efforts (we can’t say any more for fear of identifying ourselves)

Of course, the world does not stand still. New research, new experts, and new development programs are being designed all the time. We stay on top of these developments, and when it makes sense, we'll add new programs into our service offerings. And that's exactly what we did when Brené Brown released her Dare to Lead program, built on her decades long studies about courage and vulnerability.

And like the other programs, we are proud to say we are part of an elite group. For Dare to Lead, our lead facilitator is one of only 700 people around the world that was Certified directly by Dr. Brené Brown.

Our Relationship with Washington State

Government agencies in Washington were among our first clients back in 2011. Over the last decade we were on multiple Master Contracts, and have been fortunate to have several thousands of state, county, and city employees use our assessments and/or participate in our development programs. During that time, our commitment to you has grown, and we hope that the next decade allows us to provide even more value to Washington State than we did in the last!

Through the telling of our story above, we highlight a unique qualification that is particularly relevant to agencies in Washington...our deep history and experience with Lean improvement. We know how important the Lean journey has been, and continues to be, for Washington. We've been a part of Governor Inslee's Lean Partnership Program from the beginning, and we've supported/participated in the annual Lean Conference every year since inception.

Though this Master Contract does not focus on Lean services, we highlight our experience in Lean to make the point that we have a unique perspective on how to pursue organizational development and change management in agencies who are also pursuing Lean efforts. Our knowledge of Lean means that we can be a more effective strategic partner to any agency as they plan their efforts, ensuring that the structure and content of executive coaching, team development, change management, and other services support and align with other initiatives going on within the agency.

Relevant Services

- **Executive Coaching:** Our team includes qualified professional coaches who work with senior executives, mid-level managers, and other employees to measure/assess their current situation; identify improvement goals related to personal, team, and organizational objectives; set an action plan that typically involves 1-to-1 coaching, group training, and/or self-directed learning; execute the plan providing feedback along the way to both the individual and to management; monitor and assess progress using follow-on assessments; and concluding any coaching program with clear next steps for the individuals involved to ensure the effort leads to sustained growth and long lasting behavior change. To build credibility with the individuals involved, and to ensure that the coaching program is built on proven, data-based methodologies, we utilize the programs outlined in this proposal to structure coaching plans.
- **Support for Diversity, Equity and Inclusion programs:** Every coaching and/or training program we offer is built with the underlying goal of helping to build more safe, more respectful, more inclusive work environments, where every individual feels welcome and free from harassment or discrimination. The skills and concepts we help leaders and teams develop form a foundational

mindset that will help other DEI programs to take root.

- **Team Development:** Anything that gets done in a government agency ultimately relies on a team. By working directly and exclusively with an intact team, or by organizing group learning events with members from multiple teams, we help teams break down the walls that inhibit effectiveness, productivity, and cohesion. We focus on helping them work together more effectively, enabling individuals and the team as a whole develop their strengths and overcome their weaknesses, using the proven methodologies highlighted in this document. Our efforts apply to all stages of team development (forming, storming, norming, performing, adjourning), and equip teams to not only perform at a higher level, but also to embrace and champion efforts to create a safe, respectful, and inclusion work environment.
- **Coaching Workshops:** We have a broad library of coaching workshops and training programs built around the concepts explained elsewhere in this proposal. All of these programs have been revised over the last 12 months as the world shifted to a virtual workplace. We are now fully equipped to support leaders, teams and organizations with fully virtual coaching workshops associated with all our programs. In the years ahead, during the term of this Master Contract, we commit to staying ahead of workplace developments so we can be an effective partner for the State regardless of whether or not we are able to providing coaching and training in-person or virtually.
- **Change Management:** Everything we do as an organization is about driving change – for individuals, for teams, and for organizations. Our core team has worked together for 20 years, learning, developing, and training others in the latest concepts associated with helping people embrace change in the workforce. While we frequently offer coaching workshops to teach others the principles of change management, the real value of our change management background is in how we apply it to the other organizational development services we provide. When we coach leaders or teams, effective change management techniques are always built in, ensuring that those efforts achieve the long term goals our clients seek.
- **Strategic Planning:** Aligned with Lean management and the process called Hoshin planning, we work with senior teams to plan for the future, helping them work through the stages of goal setting, analysis, strategy formation, and implementation/monitoring.
- **Process Improvement:** As explained in Our Story above, our roots are in process improvement. Using the full range of Lean and Six Sigma tools and techniques, we can both train others how to execute process improvement efforts, and/or we can roll up our sleeves and get to work side-by-side with teams, serving as a coach as analyze processes, determine options, and implement solutions.

Summary Points

- Founded in 2011
- Offering a mix of services focused on executive coaching, team development, change management and process improvement
- Financially stable throughout our existence
- Serving a robust mix of government, non-profit, and corporate organizations (with deep experience with WA agencies)
- Managed by the original co-founders who are also the authors of a best-selling book about organizational development topics
- A team of well-qualified coaches, consultants, and trainers ready to serve Washington State
- Committed to helping clients develop healthy and inclusive workplaces, where every employee can feel safe, respected, and valued

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

Project 1 / Reference 1 – Organizational Development

This was a 2 year project with a government agency with ~180 employees

This government agency's journey to become the "best-run finance department in government" has earned accolades from both the public and the private sector. The National Association of Counties took notice, awarding our client its Financial Management Achievement Award in recognition of the agency's successful initiatives that have streamlined operations, provided value to customers, and created a work culture focused on problem-solving and respect.

Several years ago, the organization was in a different place. The group's fundamental culture needed to shift. Where the agency was going wasn't going to get them where they needed to be—to be the best. There needed to be an intentional focus on resetting the culture. That's when they reached out to us for counsel, coaching, and our expertise in organizational development and change management.

Over the course of this project, we coached the executives of this agency and helped them focus on preparing managers, supervisors, and others to be cultural enablers of leadership and respect. Early in our engagement we trained and coached all their leaders using The Leadership Challenge, the world-class leadership development framework that helps leaders master the Five Practices proven to lead to better outcomes: Model the Way, Inspire a Shared Vision, Challenge the Process, Enable Others to Act, and Encourage the Heart.

As part of our coaching efforts, every leader completed the a 360-degree feedback assessment called the LPI® (Leadership Practices Inventory). We conducted 1-on-1 coaching sessions to debrief individual results, and we used group learning events to build a shared language around what it meant to be a leader in this agency.

The Director of this agency has this to say: *"Having [our company] help us implement The Leadership Challenge was absolutely critical because what I've learned over time is that your work culture for any kind of a unit is most influenced by the supervisor or manager of that unit. We wanted to create more alignment—one culture instead of 20, depending on the supervisor—and The Leadership Challenge gave us a common purpose and understanding of what is expected of a leader in our environment. It gave us a construct that helped us achieve our vision. We couldn't have done it without the support and strategic guidance of [our company]"*

Knowing that leadership development isn't a one-time training event—that it takes on-going practice and commitment—our client's Executive Leadership Team took extra care to make sure everyone kept a daily focused on The Five Practices of Model, Inspire, Challenge, Enable and Encourage. We helped the group form five non-hierarchical, cross-functional teams (one for each Practice), whose charge is to promote initiatives that support extraordinary leadership behaviors throughout the workplace. By collaborating and sharing ideas with others in the organization, they continued to strengthen the agency's culture.

Building Teams to Continue Organizational Development

Although many of the positions depended on each other, teammates often saw themselves as working more individually than collaboratively. They had a hard time sharing information. The blame game

kicked in whenever a mistake was made, setting off finger pointing and creating grudges that literally lasted for years.

The team had many of the same issues experienced by our other clients, and we had a solution for them – a team development model that would enable them to successfully work through their struggles. We interviewed the members of the team to understand the issues and opportunities more clearly and then introduced them to the Five Behaviors of a Cohesive Team. We had everyone on the team take both a DiSC personality assessment and complete the Five Behaviors Team Assessment. We used the results of those assessments to plan a customized 2-day Team Retreat, where we debriefed the results and set a path forward. Using the retreat as a spring-board, we scheduled regular coaching sessions to help them layout new, more effective team procedures. Some of the outcomes from that work included:

- Improvements to their team meeting agendas and creating a “buddy system” for bringing those who missed meetings up to speed.
- A commitment from all team members to try to resolve issues one-on-one before taking it to the team leader. They adopted an “it takes two to escalate” rule for intra-team issues.
- Incorporating icebreakers into their meetings to make “getting to know each other” (a key element of sustaining trust) an on-going practice.
- Team members becoming more comfortable with giving each other constructive feedback.
- Increased emotional intelligence across all members, due to their newfound understanding of their own personality style and the styles of others (using the insights they gained from DiSC).

The growth among the leadership team was so impressive that members of the team began to spread the language to their direct reports, and we started supporting other teams in their team development efforts. Recognizing that it is impractical to have an outside consultant be the sole provider of team coaching and training, we worked with senior leadership to identify other champions that could be trained to be the agency’s internal training and facilitation team. This was a decision that ensured the concepts would be embraced far and wide throughout the agency, as it enabled us to maintain our role as executive coaches for the senior leadership team, while letting internal resources spread the ideas to the rest of the organization (with our support and guidance).

Leader Standard Work and Embracing Lean Process Management/Improvement

This client is part of a state that has embraced the principles of Lean to build more efficient, effective and accountable government. To ensure that leaders in this organization were aligned with the Lean work going on around them, we helped them establish “standard work” procedures for leaders. As background, in Lean “standard work” represents the best, easiest, and safest way to do a job, reflecting the collective wisdom of the employees who perform the work. Standard work reduces waste and variation by identifying the most effective practices, and by encouraging everyone who does that work does it in a similar way. In many organizations, leaders think “Lean is just for the front line workers.” But we know better, and now so does our client.

To help leaders in this organization really see the power of Lean, we took them through something we call “A3 Simulation Training.” This is a Lean training program we designed specifically for government leaders. It simulates a government process that needs improvement, and during the session participants work together in groups to apply Lean tools and concepts to improve the process. We then train and coach leaders to use the Lean tools that are most applicable to leadership. For this organization, that

consisted of six specific tasks: Tier Boards, Visual Controls, A3 Use, A3 Coaching, Huddle Meetings and Roundings.

By helping the leaders of this organization embrace Lean concepts, they have both become more effective as leaders, and they are also more aligned with the employees and teams that are working on more detailed Lean efforts to streamline work processes throughout the organization.

Delivering Results That Matter

By nearly every measure, our client's culture of teamwork, leadership and respect has made a profound difference in employee engagement, customer satisfaction, and bottom-line performance. Here are some of the impressive results:

- 99% of respondents to the annual employee engagement survey indicated a willingness to go above and beyond the minimum required by their job description—to give their “discretionary effort”
- 93% of external customers rate their level of satisfaction with the agency as “Very Good” or “Good”
- Output is up in Accounts Payable and invoice payment cycle time has been reduced from 30 days to 2 days, resulting in both lower cost and improved customer satisfaction

As one of the mid-level managers saw it, there is much to celebrate—and share with others. She said: “I’ve been in the public sector my entire career, which I’ve always seen as something like a glacial ridge. You know it’s changing but you can’t really see it. But I see this agency as the ship that plows through the ice. I’ve never seen such a rate of change happen in a public section organization. And it’s exciting. Even the private sector is looking at us, going, “Wow! Look at what they’re doing. How can we implement this in *our* organization?.”

And according to the agency Director, our company played an integral role in their successful journey. He said: “[Our company] mentored us as we’ve gone from being novice leaders to true practitioners, to an organization of top-notch problem solvers who really deliver benefit to our customers. We needed to shift our focus from blaming individuals to focusing on solving problems and improving processes. And with [our company’s] help, we could actually see a tangible shift starting to take place after 6 months, after 12 months. We’re seeing more intentional actions on the part of supervisors to embrace the concepts of The Leadership Challenge, to adopt The Five Behaviors of a Cohesive Team, and to use the language of Everything DiSC to improve communications across the organization.”

Project 2 / Reference 2 – Organizational Development

This was a 1 year project with a government agency with ~40 employees

When we met them, our client had just scored 66% on their annual employee engagement survey. For good reason, these results disappointed the agency Director. She said: “What I realized was that we really needed to invest in becoming a more cohesive team. We were an agency of strong individual performers but we really needed to come together as a team and start to build trust, have healthy conflict, drive commitment around our goals and hold one another accountable to achieve the results that we were looking to achieve.”

To begin developing a stronger team with higher engagement, we were hired to facilitate an off-site team retreat. The team began by taking the Five Behaviors of a Cohesive Team Assessment. The team's assessment resulted in low scores on all five behaviors – not an atypical outcome. We used those results to design an agenda that would really connected with the issues they were facing, and we gathered the team to dig into the results and create action plans for improving their cohesion and level of engagement.

Recognizing the importance of vulnerability-based trust, we focused a good percentage of the time helping the team open up and get issues out on the table. We guided the team through an exercise about personal histories exercise. As is often the case, members learned a lot of new things about each other. "We had people in that room who have worked together for 20 years who didn't know very basic things about one another," said one of the managers. This activity started to break the gridlock that existed between them.

During and after the initial session, we had the team talk about their individual styles using the language of DiSC. This helped them build a greater understanding of individual working styles. The group's styles were pretty diverse, making it a rich discussion for participants that continues to this day. One manager noted: *"People became more willing to collaborate and share what they're doing without feeling threatened."*

While the team retreat served as the kick-off, the journey was just beginning. With some new levels of trust established, we pushed ahead using the Five Behaviors framework to help build new protocols designed to reduce the negative impact of conflict. In addition to discussing healthy and unhealthy behaviors that individuals may display during conflict, we helped the team establish new ground rules for what is acceptable and unacceptable conflict during staff meetings. The Director said: "Thanks to the guidance of [our company], people are more willing now to talk about the difficult issues in the meeting rather than gossiping about them outside of meetings."

Over time, our coaching sessions morphed to focus less on issues related to trust and conflict, and more to topics that would increase team commitment and enable them to be better equipped to be accountable to one another. We helped the team structure daily huddles, which enabled them to stay focused and aligned on the most important issues facing the team.

Thanks to the team's dedication and the guidance we provided, employee engagement is way up, as reflected in the survey results (shown below):

Employee Engagement Survey Item	Recent Score	Improvement from initial score
My department's goals give guidance to my work.	95%	+ 35%
My work unit works well to solve problems and achieve common goals.	95%	+ 36%
There is a spirit of teamwork and cooperation among the members of my work unit.	86%	+ 33%
I feel encouraged to share ideas to improve the way we work.	90%	+ 26%

Project 1 / Reference 1 – Change Management

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There is a spirit of teamwork and cooperation among the members of my work unit.	86%	+ 33%
I feel encouraged to share ideas to improve the way we work.	90%	+ 26%

Quality Assurance (4 pages maximum) (150 points)

As a business partner to the State of Washington, we take our role seriously. You are entrusting us to help influence the behavior of your most important asset – your people. We know that when agencies build better leaders, better teams, and better cultures, the likelihood of success (however it’s measured for that particular agency) goes up. As such, we recognize that the organizational development, change management, and business analysis services we provide can have an exponential effect on an agency’s results. That means we have to offer the highest in quality as it relates to our people, our programs, and the delivery of our services.

OUR PEOPLE

Like you, our people are our greatest asset. As such, we take great care to both hire the best, and to invest in them once they are part of the team. Different members of our team play different roles, so we will address our approach to the quality assurance of people by category.

Program and curriculum designers

Because we are largely in the learning and development space, it is critical that our programs and curriculums embrace the latest in adult learning concepts. As such, the people in charge of creating those programs have deep experience and expertise in this area. Whether it’s in-person training or facilitation (remember when we used to be able to do things in-person?) or online, our people understand the importance of using different techniques to stimulate the learning process and to appeal to learners of all types. For example, some adults prefer to *read* to learn, others prefer to *listen*. Our program designers understand such nuances, and thus embed a range of learning techniques in all we do; techniques proven to be effective across different learning styles.

In hiring people to work on design, we look for two key things: an understanding of learning principles and the ability to demonstrate prior experience in creating programs that deliver results. Many of the people in this role have backgrounds in education or program design, where they learn the theory and practice of models like the instructional design process called ADDIE:

- Analysis
- Design
- Development
- Implementation
- Evaluation

ADDIE is a process that organizes and streamlines the production of our program content, providing a steady flow of feedback for continuous improvement. The State of Washington can rest assured that the people working to design the programs we offer are using proven learning techniques to do so.

Facilitators, trainers and coaches

The people we put in front of your employees to train them or coach them are true professionals. Unlike “big box” consultancies that hire young, inexperienced personnel, we take a different approach. By the

time someone makes it on our team as a trainer, facilitator or coach, they've already proven themselves. We first require them to demonstrate their deep knowledge of the leadership, team and organizational development programs and topics we use by being certified or accredited by an authoritarian body. Certification and accreditation has long been used as a way to ensure that a person actually knows and can actually do the things they can do. For anyone on our team that serves Washington, we can provide documentation of such certification.

Apart from proving their knowledge, we also require people to prove their effectiveness before joining the team. They do this both by sharing their resume of experience and introducing us to previous clients they've served who can speak on their behalf. Before putting a coach, trainer, or facilitator in front of *our* clients, we always confirm that they've already been able to deliver results to the satisfaction of previous clients. For anyone on our team that serves Washington, we can provide documentation of such experience, and can provide references who can share the details of their interactions with them.

Senior leadership

Each member of our senior leadership has over 20 years of directly relevant experience in the services we deliver to clients. They have achieved Certifications and Accreditations in the programs we offer, making them fully capable of both advising state agencies and providing direct services, and overseeing the other members of our team who may be serving an agency. They also hold bachelors and MBA degrees in areas relevant to the services we offer from well-regarded institutions like Virginia Tech, San Diego State, and New York University.

Prior to joining the consulting world, our executives held leadership positions in industry organizations, which gave them a foundation of practical experience that we use to ensure our effectiveness as a service provider.

The references provided in our proposal have had direct interactions with our senior leaders, and can speak to both their qualifications and the quality of their character. For DES and/or any agency, we would be glad to provide many other references as well, along with a full list of our executive's Certifications, degrees, and prior experience, giving you the confidence that they are fully qualified to perform the services to clients who utilize the DES Master Contract.

OUR PROGRAMS

Prior to launching this company in 2011, our founders already had many years of experience as practitioners in the coaching, consulting and training world. They saw first-hand the range in quality of the leadership, team development, and change management programs out there, from "home grown" programs that had little basis in research to the best-in-class programs built around data. They committed to themselves, and to our clients, that our company would only embrace the best-of-the-best, ensuring that we'd be able to delivery nothing but the highest level of quality as it relates to changing employee behavior and influencing organizational culture.

The programs we have to offer to Washington are widely recognized and praised :

- The Leadership Challenge, based on 30+ years of research about what effective leaders actually do
- The Five Behaviors of a Cohesive team, built around the concepts in one of the most successful business management books of all times, The Five Dysfunctions of a Team
- Everything DiSC, one of the most accurate personality styles instruments available based on the latest research in psychographics and computer adaptive testing
- Lean Six Sigma, the cutting edge process improvement techniques that have taken productivity and efficiency to new heights in organizations around the world
- Dare to Lead, designed using decades of research about courage and vulnerability

And our company doesn't just dabble in these world-class programs. We are among a select few who are Certified by their original creators and/or recognized as the best in offering them globally. For example:

- For The Leadership Challenge, we are one of less than 10 firms in the U.S. authorized as a Global Training Partner
- For The Five Behaviors of a Cohesive Team and Everything DiSC, we are one of fewer than 30 firms that are Certified in both and recognized by the publisher as a Diamond-level provider (the highest honor available)
- For Dare to Lead, our lead facilitator is one of only 700 people around the world that was Certified directly by Dr. Brené Brown.

With us as a partner to Washington State, every agency will have access to these world-class programs that have proven their worth by delivering impressive results for some of the best organizations in the world. And with our company being Certified and/or recognized by the relevant authors and publishers, Washington State can be assured that we are uniquely qualified to deliver them for you.

OUR SERVICE DELIVERY

Our executives believe “we have to give value before we get value.” This means that our organization sets customer service and satisfaction as our highest priority. As such, we take great care to plan our engagements carefully and to collect feedback at every step along the way to course correct as needed to and to deliver the highest level of service quality.

Every agency in Washington is unique. Every agency has its own culture, its own personality, and its own set of needs. That is why when we serve an agency, we strive to really get to know the situation – the background, the players, the relevant issues. This enables us to put OUR PEOPLE and OUR PROGRAMS to work for the benefit of each agency.

Above we explained how DES can be assured of the quality of our people and our programs. But the care we put into serving customers and managing engagement brings it all together to ensure results.

At the account management level, we document engagement goals and milestones, and work with our client partners to track and report out on our progress. We keep stakeholders and engagement sponsors informed with high level updates, and we “roll up our sleeves” and get into the details with our clients’

program managers. By setting objectives and using data to track results, we ensure that our partnership with clients is making the best use of their time and resources.

Since much of our service involves “events,” such as training classes, coaching sessions, and the like, we are also able to collect feedback to assure quality at this level. Through interview conversations and/or evaluation surveys, we capture the reactions and ideas of the end users about what worked, what might not have worked, and what can be done to deliver even greater value going forward. We dissect such feedback in partnership with our client program managers, working together as a team to make sure that all our collective efforts are focused on the stated objectives of the engagement.

Qualifications Essay (8 pages maximum) (200 points)

We begin our essay with a clear statement on how we meet the minimum qualifications. Then we explain our service offerings related to Organizational Development and Change Management. The goal of our essay is to provide DES and any client agency who might read this in the future with as much context as possible to explain the value of the services we offer.

Minimum qualifications

- Education: One principle holds a bachelor’s degree in marketing from Virginia Tech and an MBA from Golden Gate University. The other holds a bachelor’s degree in marketing from San Diego State University and an MBA from New York University.
- Experience: Our company was founded in 2011, and has been serving Washington State (and other clients) ever since with services related to Organizational Development, Change Management, and Management and Business Analysis.

How we will provide quality services to customers of the DES Master Contract

Over the last 10 years, we’ve been on multiple DES Master Contracts and we’ve been fortunate to serve a number of agencies in Washington State. During the time, we’ve had several thousand government employees in Washington use our assessments and/or participate in our organizational development and change management programs. Based on our understanding of state and individual agency needs and goals, below we highlight the services we offer that we believe would be most useful to customers of the DES Master Contract.

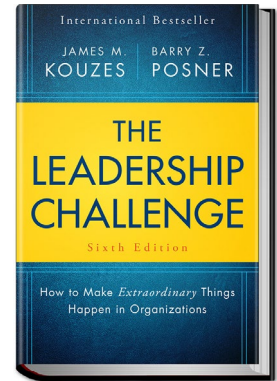
The programs themselves is just the beginning. We know that every agency’s situation is unique. As such, for every engagement we’ll develop a customized plan that uses the selected programs and concepts in the way that suites them best. This includes:

- Assessing the current state of individual, team, and organizational performance using assessments and needs analysis interviews
- Developing tailored development plans and goals – for leaders and teams – working in partnership with the individuals involved as well as other key parties such as Managers/Supervisors and other internal organizational development professionals
- Facilitating growth in individuals, teams and organizations through an appropriate combination of 1-to-1 coaching and group learning experiences (virtually and/or in-person if possible)
- Conducting regular progress reviews to measure growth and adjust plans as needed
- Using follow-on assessments that serve to identify progress and future areas of focus, ensuring that the effort is driving toward long-term, sustained behavior change
- Ensuring that individuals and teams have clear “next steps” to continue their journey long after the coaching or training ends

As a business partner to the State of Washington, we take our role seriously. You are entrusting us to help influence the behavior of your most important asset – your people. We know that when agencies build better leaders, better teams, and better cultures, the likelihood of success (however it’s measured for that particular agency) goes up. As such, we recognize that the organizational development and change management services we provide can have an exponential effect on an agency’s results. You have our commitment that we will offer the highest in quality as it relates to our people, our programs, and the delivery of our services.

Executive Coaching and Leadership Development

While some believe that “being a leader” is reserved only for those charismatic personalities in the corner office, Jim Kouzes and Barry Posner, named by The Wall Street Journal as two of the 12 most influential leadership experts, have spent over 25 years proving otherwise. Their research – reported in the best-selling book *The Leadership Challenge* – examines the collective activities and processes associated with leading, and shows that leadership is actually an observable set of skills and abilities that are accessible to any person, at any level, in any organization. With this in mind, the term “leader” can be used to describe anyone with the ability to influence the work of others, regardless of role or title.



Kouzes and Posner have collected thousands of leadership stories from people at all levels of organizational life – from CEOs to front line supervisors. Despite differences in title, age, gender, race, and other variables, these stories revealed that the process of leading follows a very consistent set of behaviors. Kouzes and Posner categorized these behaviors into five easy-to-grasp practices.

Our company is one of less than 10 firms authorized as a Global Training Partner for The Leadership Challenge. We have been Certified and approved by the authors themselves to coach and train leaders using The Five Practices of Exemplary Leadership,[®] a clear, evidence-based path to achieving the extraordinary used by over 3,000,000 people and organizations around the globe. It turns the abstract concept of leadership into understandable Practices that can be learned by anyone – from Supervisors to Managers to Directors – willing to step up and accept the challenge to lead. Ongoing studies consistently confirm that The Five Practices are positively correlated with both the effectiveness of leaders, and the level of commitment, engagement, and satisfaction of those that follow.

- **Model the Way (Practice 1)**
Leaders establish principles concerning the way people should be treated and the way goals should be pursued. They create standards of excellence and set an example for others to follow. They unravel bureaucracy when it impedes action, and they create opportunities for victory.
- **Inspire a Shared Vision (Practice 2)**
Leaders passionately believe that they can make a difference. They envision the future, creating an ideal and unique image of what the organization can become. Leaders enlist others in their dreams. They breathe life into their visions and get people to see exciting possibilities for the future.
- **Challenge the Process (Practice 3)**
Leaders search for opportunities to change the status quo. They use Lean Thinking to look for innovative ways to improve the organization. In doing so, they experiment and take risks. And because leaders know that risk taking involves mistakes and failures, they accept the inevitable disappointments as learning opportunities.
- **Enable Others to Act (Practice 4)**

Leaders foster collaboration and build spirited teams. They actively involve others. Leaders understand that mutual respect is what sustains extraordinary efforts; they strive to create an atmosphere of trust and human dignity. They strengthen others, making each person feel capable and powerful.

- Encourage the Heart (Practice 5)
Accomplishing extraordinary things is hard work. To keep hope and determination alive, leaders recognize contributions that individuals make. In every winning team, the members need to share in the rewards of their efforts, so leaders celebrate accomplishments. They make people feel like heroes.

Because The Leadership Challenge (aka “TLC”) is built around observable behaviors, it should be no surprise that TLC includes a highly credible measurement instrument. The Leadership Practices Inventory (LPI) is one of the most widely used leadership assessment instruments in the world.

With the LPI, leaders rate themselves on the frequency with which they believe they engage in the behaviors associated with each of The Five Practices of Exemplary Leadership. A group of “observers” (direct reports, managers, peers, etc.) also complete the survey, indicating the frequency with which they experience the leader engaging in the same behaviors. Combined, these different perspectives provide valuable insight into how the participant views him/herself, how others view him/her, and what actions can be taken to improve the individual’s ability to lead.

Notice that the LPI is not a “yes she does that” or “no she does not” survey. The research shows that most leaders practice these behaviors at least some of the time. In fact, the findings are very clear that *frequency* of behavior is what differentiates the most effective leaders from their less effective counterparts. The data undeniably shows that when leaders more frequently exhibit these behaviors, customer-focused results improve, organizational alignment and accountability increases, process improvement efforts thrive and employee engagement rises.

In addition to the LPI assessment, there is a suite of *Leadership Challenge* products and services to help individuals and organizations internalize the concepts and tools, including guided development programs, books, workshops and personal coaching. Most organizations use an in-person workshop as a foundational learning event, during which participants learn about the *Five Practices*, receive LPI feedback, and begin to construct a personal development plan. While workshop agendas are typically customized to meet the needs of the given organization, common highlights include:

- Receiving and reflecting on a personal LPI feedback report
- Sharing “personal best” leadership stories
- Activities designed to help clarify personal values
- Working with other participants to define and refine your own vision of the future
- Learning new techniques for challenging the status quo
- Discussing how to build competence in others and influence collaboration
- Becoming familiar with innovative ways to recognize others and celebrate group accomplishments

But the real learning does not happen during a single event; it occurs over time, as leaders execute their development plans, evolve their behaviors and engage with others. The two-way interaction that takes place between leaders and their direct reports is a critical piece of the growth process. The concepts of TLC and the results of LPI evaluations are meant to be shared and used to set new, more productive expectations between leaders and team members.

The TLC framework and the LPI instrument combine to offer a highly effective framework for both 1-on-1 executive coaching and broader leadership development efforts that include group learning events. And because the Five Practices of Model the Way, Inspire a Shared Vision, Challenge the Process, Enable Others to Act, and Encourage the Heart are all rooted in building greater levels of respect for individuals, TLC is an excellent leadership model for any organization pursuing DEI (diversity, equity, inclusion) efforts, and looking to build a more respectful and inclusive culture, where everyone can feel safe and free from discrimination and harassment.

Team Development

“Not finance. Not strategy. Not technology. It is teamwork that remains the ultimate competitive advantage, both because it is so powerful and so rare.”

- Patrick Lencioni, Author of *The Five Dysfunctions of a Team*

An “organization” can be defined as a group of people who have joined forces to achieve some form of shared purpose. In other words, an organization is just a large team, most likely made up of many smaller teams called divisions, departments, functions, etc. So it follows that the *culture* of an organization will be shaped largely by how people on teams interact with each other. With this in mind, any organization looking to develop a healthy culture must take the time to define some common practices around building cohesive teams.

Research shows that highly cohesive teams consistently outperform other groups of people. Why? Because cohesive teams:

- Make better, faster decisions
- Tap into the skills and opinions of all members
- Avoid wasting time and energy on politics, confusion and destructive conflict
- Have more fun while being more productive



But how does a “normal” team become a highly cohesive team? They do it by dedicating time and effort to instilling five key behaviors:

1 – Cohesive Teams Trust One Another

Members of great teams trust one another on a fundamental, emotional level, and they are comfortable being vulnerable with each other about their weaknesses, mistakes, fears, and behaviors. They get to a point at which they can be completely open with one another, without filters.

2 - Cohesive Teams Engage in Conflict Around Ideas

Members of teams who trust one another are not afraid to engage in conflict around ideas that are key to the organization’s success. They do not hesitate to disagree with, challenge, and question each other, all in the spirit of finding the best answers, discovering the truth, and making great decisions.

3 - Cohesive Teams Commit to Decisions

Teams that engage in conflict around ideas are able to gain commitment to decisions, even when some members of the team initially disagree. That is because they ensure that all opinions and ideas are put on the table and considered, giving confidence that no stone has been left unturned.

4 - Cohesive Teams Hold One Another Accountable

Teams that gain commitment to decisions and standards of performance do not hesitate to hold one another accountable for adhering to those decisions and standards. What’s more, they don’t rely on the team leader as the primary source of accountability; they go directly to their peers.

5 - Cohesive Teams Focus on Achieving Collective Results

Team members who trust one another, engage in conflict around ideas, gain commitment to decisions, and hold one another accountable are more likely to set aside their individual needs and agendas and focus on achieving collective results. They do not give in to the temptation to place their departments, career aspirations, or status ahead of the collective results that define team success.

Our company is ready to help teams across Washington work through these Five Behaviors to be the best they can be. The process typically includes having the team complete an assessment about where they are right now in the areas of Trust, Conflict, Commitment, Accountability and Results, and what they all think they can do to improve. The resulting report is a personalized roadmap for where to go next. The details of every engagement is tailored to meet the needs and situation of that team or organization.

In previous Team Development engagements with WA agencies and other organizations, our company has frequently provided our hands-on coaching services to the senior leadership teams, while using our train-the-trainer services to help internal coaches and trainers learn the program so, in turn, they can manage the process of training and coaching teams throughout the agency. We find that such a two-pronged approach can both be a better use of taxpayer funds, and serves to more effectively embed the concepts deep into the culture of the organization.

Agencies that use the Five Behaviors framework can expect to achieve results such as:

- Higher levels of trust
- Improved communication and collaboration
- Safe environments where diversity, equity and inclusion thrives
- The ability to more effectively work through the five stages of team development: forming, storming, norming, performing, and adjourning

Improving Relationships and Communication at Every Level

What Drives People To Do What They Do?

Each of us has our own personality preferences and styles. These differences in preferences and styles shape the relationships in our lives. To a large degree, our individual styles influence who we collaborate well with, and who we tend to have more difficulty with. But the beauty of our preferences and styles is that they are only that...preferences and styles.



Everything DiSC is the most effective and most reliable tool on the market to help us understand these preferences and styles – both in ourselves and in others. DiSC® is a very simple—and memorable—model made up of four basic styles: D for Dominance, i for Influence, S for Steadiness, and C for Conscientiousness. The knowledge gained by this simple assessment can be used to drive better teamwork, collaboration and productivity. Obviously, these are key elements of achieving a Lean Culture.

So why is it so important to understand personality styles and behavioral preferences?

It goes back to those ancient Greeks, Socrates, and Plato, who encouraged their students to “know thyself.” It’s the mastery of this first step that makes it possible to take the important second step of understanding the people around you (not to mention the *world* around you).

Personality assessments are like a special combination of a magic mirror and flashlight, allowing people to see themselves clearly and then shining a bright light that enables them to see their colleagues with clarity and greater understanding. Motivations are revealed. Behaviors are explained. Preferences make sense like never before.

Make no mistake – this is not about “labeling” people. To the contrary, the goal is to use this knowledge to connect with people more effectively, and to get ahead of potential problems before they become actual problems.

Since all organizations are collections of humans attempting to work together toward a common goal, you can see why understanding yourself and your co-workers could be the foundation of every interaction, every objective, and every success.

Our company will help agencies use DiSC as part of the effort to improve teamwork, understand and honor the differences between people, and build a respectful and inclusive culture. The benefits include:

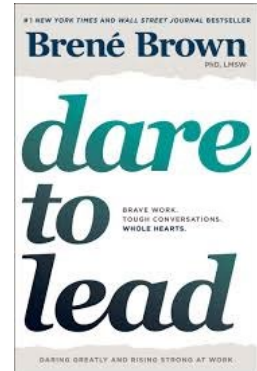
- Helping employees better understand and honor the differences in the colleagues around them, setting a foundation that influences greater levels of respect and inclusion throughout the agency
- Providing a common language to help colleagues understand one another and work better together
- Acting as a springboard for conversations and team building
- Improving employee and workplace communication
- Reducing conflict and avoids misunderstandings

Embracing Vulnerability and Building Courage

Based on the teachings of leadership pioneer and best-selling author Brené Brown, Dare to Lead is an empirically based, courage-building methodology based on four innovative skill sets. Dare to Lead will benefit a number of agencies (in fact, it already has).

Dr. Brown's deep research into leadership reveals that the ideal leader is someone who cultivates a culture in which brave work, tough conversations and whole hearts are the expectation. These skill sets are:

- Rumbling with Vulnerability – Learn how to face risk, uncertainty, and tough conversations with courage, clarity, and empathy.
- Living Into Your Values – Identify what you stand for and how to show up from a place of integrity every day.
- Braving Trust – Discover how to build meaningful and authentic connections with your teams, colleagues and customers so you can work together from a foundation of trust.
- Learning to Rise – Become aware of your emotions and stories and learn how to show up and lead with courage – even when faced with failure, disappointment, and setbacks.



This program is focused on the teachings of Dr. Brené Brown from her inspirational bestseller “Dare to Lead: Brave Work. Tough Conversations. Whole Hearts.” Her TED talk on “The Power of Vulnerability” has been viewed over 50 million times. Dare to Lead, has been described as “the ultimate playbook for developing brave leaders and courageous cultures.”

The concepts of Dare to Lead are uniquely aligned with Washington's focus on embracing diversity, equity and inclusion. Supporting DEI efforts requires employees at all levels to embrace vulnerability and to be courageous. Our company can help agencies do exactly that by applying these concepts to their daily behaviors and interactions with each other.

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

“Honor the differences” is a key theme in all we do as an organization. We practice it internally, and we include it as a key theme when we coach and train others. Because we all spend such a large percentage of our waking hours at work, we believe that creating diverse, supportive and inclusive workplaces – where every employee feels safe, welcomed, and respected – is one of the highest priority actions any of us can take.

How we demonstrate our commitment externally

As an Organizational Development consulting company that helps clients with change management and business analytics, we recognize our unique opportunity to help organizations understand and embrace the importance of diversity, equity, and inclusion. We do this both in the design and delivery of what we provide.

Design and delivery

An important part of the services we provide includes designing training curriculums and workplace procedures. The leadership and team development programs we offer all embrace and align with the Washington State Enterprise Leadership Competencies. A goal that spans all our programs is the belief that “leadership is everyone’s business,” and that by helping employees at all levels embrace actions like communicating effectively, fostering teamwork and collaboration, embedding inclusion in decision-making, and fostering learning, we can be a positive force in influencing higher levels of cultural humility.

While a large part of what we do can be called “training,” we understand that humans, especially adults, don’t often change their behavior just by attending a “training session.” Real behavior change comes not just from the Awareness and Understanding that’s created in a class room, but from the Experimentation and Adoption of new ideas and practices that can only be achieved when training topics are embraced in daily life. As such, though most of our services are not specifically “Diversity, Equity and Inclusion” programs, we understand that DEI is much broader than a “training topic.” Concepts of DEI are something that should be embedded in everything we do in the workplace.

When we help a client design a leadership curriculum, or a coaching program, we know that the best thing we can do is normalize the investigation and discussion of diversity, equity and inclusion topics. In fact, in many situations, we’ve found that we can be *more effective* at helping people think about issues such as microaggression, bias, intersectionality, and the impact of stereotyping when those are not the stated goals of the program. By making these topics an integrated part of leadership development, we are able to remove the stigma that many employees feel in talking about them, and we can lower the resistance that many employees demonstrate when faced with the prospect of recognizing their own biases.

Our training and development services put us in front of employees in situations where they are primed to learn and discuss issues related to organizational success. As we discuss the real issues that they are dealing with – like how to overcome team dysfunction or how to interact more productively with colleagues who don’t see the world the same way – we are able to talk about how issues of diversity, equity or inclusion might be impacting the situation. This can counter an employee’s perception that DEI is a “theoretical” concept by demonstrating its real-life application.

Helping people understand that DEI is good business

As Governor Inslee stated in his 2018 memo on inclusive and respectful work environments, we know that when state employees have the workplaces they deserve, they are able to do their best work for the people of Washington. Apart from just being the right thing to do, we know that embracing diversity, equity and inclusion is also good business. Consider some findings from recent studies that demonstrate the inclusive organizations are more productive, are more successful at recruiting and retaining talent, and are more successful financially:

- Companies with higher levels of gender diversity *and* with HR policies and practices that focus on gender diversity are linked to lower levels of employee turnover (Cara C. Maurer and Israr Qureshi, “Not Just Good for Her: A Temporal Analysis of the Dynamic Relationship Between Representation of Women and Collective Employee Turnover,” *Organization Studies*)
- Thirty-five percent of an employee’s emotional investment to their work and 20% of their desire to stay at their organization is linked to feelings of inclusion. (Dnika J. Travis, Emily Shaffer, and Jennifer Thorpe-Moscon, *Getting Real About Inclusive Leadership: Why Change Starts With You*)
- When employees feel both included and that their employer supports diversity, they report experiencing trust and increased engagement at work. (Luu Trong Tuan, Chris Rowley, and Vo Thanh Thao, “Addressing Employee Diversity to Foster Their Work Engagement,” *Journal of Business Research*, vol. 95)
- Companies with higher diversity in management earned 38% more of their revenues, on average, from innovative products and services than those companies with lower diversity. (Rocío Lorenzo, Nicole Voigt, Karin Schetelig, Annika Zawadzki, Isabell M. Welpé, and Prisca Brosi, *The Mix That Matters: Innovation Through Diversity*)
- Organizations can maximize the benefits of diversity in teams by cultivating “diversity mindsets,” defined as the shared understanding of a team’s diversity and its positive benefits to group performance. (Astrid C. Homan, “Dealing with Diversity in Workgroups: Preventing Problems and Promoting Potential,” *Social and Personality Psychology Compass*, vol. 13, no. 5)

Helping employees understand statistics like these can serve to increase the commitment to the need for greater levels of diversity, equity, and inclusion in the workplace.

How we demonstrate our commitment internally

While we expect that you are most interested in how we as a partner to Washington State can help influence higher levels of and greater commitment to diversity, equity, and inclusion – which is what we highlight above – we also want to take a moment to state our own commitment to DEI. Internally, we fight discrimination and bias by engaging in open dialogs about the experiences of all our teammates.

We foster a work environment where everyone on our team feels safe to raise issues and welcome to share the details of their individual experience. Everyone on our team both knows the critical importance of DEI, at both a business and human level. From our executives to our front line, we embrace the dual facts that we, on the one hand, have made progress in expanding our individual and collective understanding of how to be more equitable and inclusive, and on the other, that we still have plenty of learning and growing to do. So, as we serve Washington State, we will not only be influencing a better culture for you; we will also be influencing a better culture for ourselves.

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	\$ 200
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	\$ 0 (<i>\$1 if \$0 is unacceptable</i>)

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



EXHIBIT A-1 – BIDDER’S CERTIFICATION

Competitive Solicitation:	No. 01620 – Business Consulting Services		
Bidder:	Integris Performance Advisors Type/print full legal name of Bidder		
Bidder’s Address:	35 Geriola Ct, Pleasant Hill, CA 94523 Type/print Bidder’s Address		
Bidder Organization Type: Check appropriate box	Corporation:	<input type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Limited Liability Company (LLC):	<input type="checkbox"/> Domestic	<input checked="" type="checkbox"/> Foreign
	Partnership:	<input type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Sole Proprietorship:	<input type="checkbox"/>	
State of Formation:	California 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 the following three (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: Integris Performance Advisors
Print Name of Bidder – Print full legal entity name of the firm submitting the Bid

By: 
Signature of Bidder's authorized person

Brett Cooper
Print Name of person making certifications for Bidder

Title: President
Title of person signing certificate

Place: Pleasant Hill, CA
Print city and state where signed

Date: 1/24/2021

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:	Integrus Performance Advisors

BIDDER INFORMATION	
<p>Legal name and address of Bidder:</p> <p>Note: This must match information from Business License</p>	<p>_ Integrus Performance Advisors _____ Business Name</p> <p>_ 35 Geriola Ct _____ Address</p> <p>_ Pleasant Hill, CA 94523 _____ City, State, Zip Code</p>
<p>Washington State Department of Revenue Registration Number:</p> <p>Note: This is the Unified Business Identifier (UBI)</p>	<p>_ 603189114 _____</p>
<p>Federal Tax ID No. (TIN):</p> <p>Note: If your TIN is a Social Security number, provide only the last four digits.</p>	<p>_ 47-4867395 _____</p>
<p>Is your firm certified as a minority or woman owned business with the Washington State Office of Minority & Women’s Business Enterprises (OMWBE)?</p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If yes, provide MWBE certification no. _____</p>
<p>Is your firm a self-certified Washington State small business?</p> <p>Note: See definitions of ‘microbusiness,’ ‘minibusines,’ and ‘small business,’ set forth in RCW 39.26.010.</p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If yes, what is your business size? Small <input type="checkbox"/> Mini <input type="checkbox"/> Micro <input type="checkbox"/></p>
<p>Is your firm certified as Veteran Owned with the Washington State Department of Veteran Affairs?</p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If yes, provide WSDVA certification no. _____.</p>

CONTRACT MANAGEMENT POINTS OF CONTACT	
Authorized Representative Name: <u>Samantha Kerrigan</u> Email: <u>Samantha.kerrigan@integriska.com</u> Phone: <u>609-630-0601</u>	Contract Administrator Name: <u>Samantha Kerrigan</u> Email: <u>Samantha.kerrigan@integriska.com</u> Phone: <u>609-630-0601</u>
Sales Reporting Representative Name: <u>Samantha Kerrigan</u> Email: <u>Samantha.kerrigan@integriska.com</u> Phone: <u>609-630-0601</u>	Sales Reporting Alternate Name: <u>Brett Cooper</u> Email : <u>Brett.cooper@integriska.com</u> Phone: <u>609-630-0601</u>
Management Fee Representative Name: <u>Samantha Kerrigan</u> Email: <u>Samantha.kerrigan@integriska.com</u> Phone: <u>609-630-0601</u>	Management Fee Contact Alternate Name: <u>Brett Cooper</u> Email: <u>Brett.cooper@integriska.com</u> Phone: <u>609-630-0601</u>
Address for Enterprise Services to send management fee invoices: Company name: <u>Integrisk Performance Advisors</u> Attn: <u>Samantha Kerrigan</u> Address: <u>29 Masters Circle</u> City/State/Zip: <u>Marlton, NJ 08053</u>	

ORDERING/SALES POINTS OF CONTACT (expand as necessary)			
Name	Phone Number	E-mail	Area of Responsibility
Samantha Kerrigan	609-630-0601	Samantha.Kerrigan@integriska.com	Purchasing, ordering, administration
Brett Cooper	609-630-0601	Brett.Cooper@integriska.com	Management

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>Finance and Business Operations Division</u>
Contact & Title:	<u>Ken Guy, Director</u>
Phone:	<u>206-263-9254</u>
Email:	<u>Ken.Guy@kingcounty.gov</u>
Reference 2 – Organizational Development, if applicable	
Company Name:	<u>Business Resource Center</u>
Contact & Title:	<u>Chauntelle Hellner, Deputy Director</u>
Phone:	<u>206-263-2253</u>
Email:	<u>Chauntelle.Hellner@kingcounty.gov</u>
-----	-----
Reference 1 – Change Management, if applicable	
Company Name:	<u>King County Finance and Business Operations Division</u>
Contact & Title:	<u>Ken Guy, Director</u>
Phone:	<u>206-263-9254</u>
Email:	<u>Ken.Guy@kingcounty.gov</u>
Reference 2 – Change Management, if applicable	
Company Name:	<u>Business Resource Center</u>
Contact & Title:	<u>Chauntelle Hellner, Deputy Director</u>
Phone:	<u>206-263-2253</u>
Email:	<u>Chauntelle.Hellner@kingcounty.gov</u>
-----	-----
Reference 1 – Management and Business Analysis, if applicable	
Company Name:	
Contact & Title:	
Phone:	
Email:	
Reference 2 – Management and Business Analysis, if applicable	
Company Name:	
Contact & Title:	
Phone:	
Email:	

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: _____

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.

Brett Cooper, President		1/22/2021
Name, Title	Signature	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: INTEGRIS PERFORMANCE ADVISORS

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

By: 
Signature of Bidder's authorized person

Brett Cooper
Print Name of person making certifications for Bidder

Title: President
Title of person signing certificate

Place: Pleasant Hill, CA
Print city and state where signed

Date: 1/22/2021

Return this Bidder's Certification to Procurement Coordinator at:
DESContractsTeamCedar@des.wa.gov

From: [Brett M. Cooper](#)
To: [DES Contracts Team Cedar](#)
Subject: Solicitation No. 01620 - Integris response
Date: Sunday, January 24, 2021 11:35:17 AM
Attachments: [Integris 01620 Exhibit A-1 - Bidder's Certif - signed.pdf](#)
[Integris 01620 Exhibit A-2 - Bidder's Profile.docx](#)
[Integris 01620 Exhibit A-3 - Responsible Bidder - signed.pdf](#)
[Integris 01620 Bidder Response Sheet.docx](#)

External Email

Hello Clayton and the rest of the DES contacts team -

On behalf of the entire team here at Integris, I am pleased to submit our bid for solicitation No. 01620 - Business Consulting Services. We have enjoyed and appreciated being a partner to Washington State over the last 10 years, and we hope your evaluation team approves us to be on the Master Contract for the years ahead.

If you have any questions for me, please let me know. Otherwise, I look forward to hearing the results of your evaluations on or around February 17.

All the best,
Brett

—
Brett M. Cooper
President & Co-Founder, [Integris Performance Advisors](#)
Brett.Cooper@IntegrisPA.com

Our new book: [Solving the People Problem: Essential Skills Your Need to Lead and Succeed in Today's Workplace](#)