



**State of Washington  
Washington Military Department**

**CFMO**

**RFP24-001**

**WAARNG  
Real Property Development Plan /  
25 Year Facilities Plan Update  
(2024-2049)**

August 31, 2023



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LETTER OF INTEREST

August 31, 2023

EMAIL TO: contracts.office@mil.wa.gov

PROPOSAL FOR: Washington Military Department CFMO  
**WAARNG Real Property Development Plan/25 Year Facilities Plan Update (2024 - 2049)**

Selection Committee Members:

Halcyon Northwest, LLC (Halcyon), a Washington State-based strategic planning and change management consulting firm, has a nine-year history of success in delivering projects for Washington State agencies. Our team's extensive background in asset management and comprehensive planning makes Halcyon the ideal fit for WAARNG's 25-year facilities plan update.

Halcyon has a proven track record of managing strategic planning processes and writing strategic plans for Washington State agencies. Our company has produced two Washington State Strategic Highway Safety Plans, is currently working on the Suicide Prevention Plan for the Washington State Department of Health, and recently completed a wellness study on behalf of the Washington State Commission of African American Affairs. We are also currently working on two large projects at the Washington State Department of Natural Resources, familiarizing our team with land use in Washington, as well as related federal and state regulations.

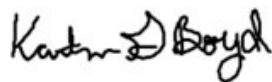
Halcyon team members specialize in working on large-scale stakeholder efforts to develop comprehensive, immediately useful plans on behalf of our partners. We have expertise in data-heavy plans, conveying key messages to readers through clear writing, explanatory graphics, and easy-to-read formatting. Also, our Project Manager **Bridget Manalo** has a long relationship with the US Army, having been both a service member and, later, managed projects on behalf of the 1st Special Forces Group (Airborne) Family Readiness programs at Joint Base Lewis-McChord for ten years.

Similarly, **Jack Dempsey, of Asset Management Partnership LLC**, and **Mary Blake, of Rock Harbor Consulting LLC**, bring decades of experience delivering real property management and other asset management plans for government clients. Jack, a nationally recognized expert in asset management, has developed these plans on behalf of the Army National Guard, the US Army, the US Air Force, the US Coast Guard, and the US Army Corps of Engineers. Jack is also currently leading implementation of the Army's Mission Dependency Index (MDI) that will include surveys at Joint Base Lewis McChord inclusive of WAARNG facilities over this coming year. Mary has facilitated asset management planning for the Department of Homeland Security, the US Coast Guard, Amtrak, and other government agencies. She has also managed strategic planning, business case analysis, and change communications to ensure facility readiness objectives are achieved.

Together, the Halcyon Team has the knowledge, experience, and know-how needed to generate the WMD/WAARNG Real Property Develop Plan / 25-Year Facilities Plan Update (2024- 2049) that will address today's and tomorrow's readiness needs. We will work with WAARNG leadership to identify the most critical issues in the coming years and develop an impactful plan to clarify the objectives, then the strategy needed to achieve them.

We look forward to working with you.

Sincerely,



Katherine Boyd, MPA, PMP, Prosci Certified Change Manager  
CEO and Principal | Halcyon Northwest, LLC  
katherine@halyconnw.com

# Table

## **Attachments**

- A2 Bidder's Certification
- A3 Bidder's Profile
- *B2 Contract Issues List is not applicable*
- C Diverse Business Inclusion Plan - Subcontractors



**BIDDER'S CERTIFICATION**

Competitive Solicitation:	No. RFP24-001 <b>WAARNG Real Property Development Plan / 25 Year Facilities Plan Update (2024-2049)</b>		
Bidder:	Type/print full legal name of Bidder	<b>Halcyon Northwest LLC</b>	
Bidder's Address:	Type/print Bidder's Address	<b>424 Sycamore Road Coupeville, WA 98239</b>	
Bidder Organization Type: Check appropriate box	Corporation:	<input type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Limited Liability Company (LLC):	<input checked="" type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Partnership:	<input type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Sole Proprietorship:	<input type="checkbox"/>	
State of Formation:	<b>Washington</b> 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 attachments) and the terms and conditions of the 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 WMD 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 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 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 one hundred eighty (180) days from and after the bid due date specified in the Competitive Solicitation. WMD 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 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 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 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 for each and all of the required insurance coverages as specified in the Contract (note: Bidder must attach the Insurance Certificate).
- OR
- BIDDER WILL OBTAIN REQUIRED INSURANCE.** Bidder does not have a current, valid Certificate of Insurance for each and all of the required insurance coverages as specified in the Contract but, if designated as the Apparent Successful Bidder, Bidder will provide such a Certificate of Insurance, without exception of any kind, to WMD within twenty-four (24) hours of such designation or notification by WMD 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 for each and all of the required insurance coverages as specified in the Contract and, if designated as the Apparent Successful Bidder would not be able to provide such a Certificate of Insurance to WMD 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 and its officers, directors, and managers have not, within the three (3) year period preceding the date of this Competitive Solicitation, been convicted or had a civil judgment rendered against Bidder or such officers, directors, and managers 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 Bidder and its officers, directors, and managers are 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 or its officers, directors, or managers have been convicted or had a civil judgment rendered against Bidder or such officers, directors, or managers 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 49.46](#), [RCW 9.48](#), or [RCW 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 49.46](#), [RCW 49.48](#), or [RCW 49.52](#) within three (3) years prior to the date of the above-referenced Competitive Solicitation date.

12. 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.

13. 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.

14. 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.

15. 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.

16. REGISTRATION WITH WASHINGTON SECRETARY OF STATE. Bidder certifies as follows (*must check one*):

- BIDDER IS REGISTERED WITH WASHINGTON SECRETARY OF STATE.* Bidder is registered with the Washington Secretary of State, is in good standing, and has the following Unified Business Identifier (UBI) number: 604-097-531.

OR

- BIDDER WILL REGISTER WITH WASHINGTON SECRETARY OF STATE.* Bidder is not registered with the Washington Secretary of State but, if designated as the Apparent Successful Bidder, Bidder will register with the Washington Secretary of State and obtain a UBI number within twenty-four (24) hours of such designation or notification by WMD or be deemed a nonresponsive bid.

OR

- BIDDER IS NOT REGISTERED WITH WASHINGTON SECRETARY OF STATE.* Bidder is not registered with the Washington Secretary of State and Bidder declines to register with the Washington Secretary of State. *Note:* WMD requires all awarded bidders (including Washington firms and out of state firms) to be registered with the Washington Secretary of State. Bidders who are not registered will not be awarded a Contract.

17. REGISTRATION WITH WASHINGTON STATE DEPARTMENT OF REVENUE. Bidder certifies as follows (*must check one*):

- BIDDER IS REGISTERED WITH WASHINGTON STATE DEPARTMENT OF REVENUE.* Bidder is registered with the Washington State Department of Revenue, has a business license to do business in Washington, and has the following Unified Business Identifier (UBI) number: 604-097-531

OR

- BIDDER WILL REGISTER WITH WASHINGTON STATE DEPARTMENT OF REVENUE.* Bidder is not registered with the Washington State Department of Revenue but, if designated as the Apparent Successful Bidder, Bidder will register with the Washington State Department of Revenue and obtain a business license within twenty-four (24) hours of such designation or notification by WMD or be deemed a nonresponsive bid.

OR

- BIDDER IS NOT REGISTERED WITH WASHINGTON STATE DEPARTMENT OF REVENUE.* Bidder is not registered with the Washington State Department of Revenue and Bidder declines to register with the Washington State Department of Revenue. *Note:* WMD requires all awarded bidders (including Washington firms and out of state firms) to be registered with the Washington State Department of Revenue. Bidders who are not registered will not be awarded a Contract.

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

- NO SUBCONTRACTORS.* If awarded a 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 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 WMD, 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:* Do not provide any SSN.

19. 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 three (3) requirements:
- *Location.* 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.
  - *Size.* Bidder must be owned and operated independently from all other businesses and have either: (a) fifty (50) or fewer employees; or (b) gross revenue of less than seven million dollars (\$7,000,000) annually as reported on Bidder's federal income tax return or its return filed with the Washington State Department of Revenue over the previous three consecutive years.
  - *WEBS Certification.* Bidder must have certified its Washington Small Business status in Washington's Electronic Business Solution ([WEBS](#)).

OR

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

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

- CERTIFIED VETERAN-OWNED BUSINESS.* Bidder is a Certified Veteran-Owned Business under RCW 43.60A.190. To qualify as a Certified Veteran-Owned Business, Bidder must meet four

(4) requirements:

- **51% Ownership.** Bidder must be at least fifty-one percent (51%) owned and controlled by:
  - A veteran as defined as every person who at the time he or she seeks certification has received a discharge with an honorable characterization or received a discharge for medical reasons with an honorable record, where applicable, and who has served in at least one of the capacities listed in RCW 41.04.007;
  - A person who is in receipt of disability compensation or pension from the department of veterans affairs; or
  - An active or reserve member in any branch of the armed forces of the United States, including the national guard, coast guard, and armed forces reserves.
- **Washington Incorporation/Location.** Bidder must be either an entity that is incorporated in the state of Washington as a Washington domestic corporation or, if not incorporated, an entity whose principal place of business is located within the State of Washington.
- **WEBS Certification.** Bidder must have certified its Veteran-Owned business status in Washington’s Electronic Business Solution ([WEBS](#)).
- **WDVA Certification.** Bidder must have provided certification documentation to the Washington Department of Veterans’ Affairs (WDVA) and be certified by WDVA and listed as such on WDVA’s website ([WDVA – Veteran-Owned Businesses](#)).

OR

**NOT A CERTIFIED VETERAN-OWNED BUSINESS.** Bidder is not a Certified Veteran-Owned Business under RCW 43.60A.190.

21. WASHINGTON STATE ENTERPRISE LEADERSHIP COMPETENCIES – DIVERSITY, EQUITY, & INCLUSION. Bidder certifies as follows (*must check one*):

**UNDERSTANDS & WILL FOLLOW WASHINGTON STATE ENTERPRISE LEADERSHIP COMPETENCIES.** Bidder has reviewed, understands, and if awarded a Contract, will follow the [Washington State Enterprise Leadership Competencies](#) in performing such Contract and, if utilizing subcontractors, will ensure that such subcontractors also follow the *Washington State Enterprise Leadership Competencies* in performing such Contract.

OR

**DOES NOT FOLLOW WASHINGTON STATE ENTERPRISE LEADERSHIP COMPETENCIES.** Bidder does not follow the [Washington State Enterprise Leadership Competencies](#).

22. SOFTWARE, EQUIPMENT, PERSONNEL, & SUPPLIES. Bidder certifies as follows (*must check one*):

**HAS SOFTWARE, EQUIPMENT, PERSONNEL, & SUPPLIES.** Bidder currently possess all necessary software, equipment, qualified personnel, and supplies to provide the services as defined in the solicitation.

OR

**WILL OBTAIN SOFTWARE, EQUIPMENT, PERSONNEL, & SUPPLIES.** Bidder does not currently possess all necessary software, equipment, qualified personnel, and supplies to provide the services as defined in the solicitation, but, if designated as the Apparent Successful Bidder, Bidder will



provide evidence satisfactory to WMD that it has obtained and possess all necessary software, equipment, qualified personnel, and supplies to provide the services as defined in the solicitation, without exception of any kind, to WMD within twenty-four (24) hours of such designation or notification by WMD or be deemed a nonresponsive bid.

OR

*DOES NOT HAVE SOFTWARE, EQUIPMENT, PERSONNEL, & SUPPLIES.* Bidder currently does not possess all necessary software, equipment, qualified personnel, and supplies to provide the services as defined in the solicitation.

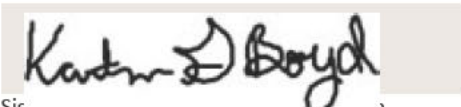
23. REFERENCES. Bidder certifies that the references provided to WMD have worked with Bidder and that such individuals and firms have full permission, without any additional requirement or release, to provide such references and information to WMD, Bidder hereby authorizes WMD (or its agent) to contact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

Bidder further certifies that it shall provide immediate written notice to WMD 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: **Halcyon Northwest LLC**

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

By:   
Sig. ....

**Katherine G. Boyd**

Print Name of person making certifications for Bidder

Title: **Owner/CEO**

Title of person signing certificate

Place: **Coupeville, Washington**

Print city and state where signed

Date: **August 30, 2023**

Return this Bidder’s Certification to Procurement Coordinator at:

[contracts.office@mil.wa.gov](mailto:contracts.office@mil.wa.gov)

**Bidder's Profile**

Competitive Solicitation:	No. RFP24-001 <b>WAARNG Real Property Development Plan / 25 Year Facilities Plan Update (2024-2049)</b>
Bidder:	<b>Halcyon Northwest LLC</b> Type/print full legal name of Bidder

BIDDER INFORMATION	
<p>Legal name of Bidder:</p> <p>Address of Bidder:</p> <p><i>Note:</i> This must match information from Bidder's Washington Business License.</p>	<p>Business Name <b>Halcyon Northwest LLC</b></p> <p>Address <b>424 Sycamore Road</b></p> <p>City, State, Zip Code <b>Coupeville, WA 98239</b></p>
<p>Bidder's Washington State Department of Revenue Registration Number/Unified Business Identifier (UBI) Number:</p> <p><i>Note:</i> A nine digit UBI number is assigned to each registered businesses in Washington.</p>	<p><b>UBI # 604-097-531</b></p>
<p>Taxpayer Identification No. (TIN):</p> <p><i>Note:</i> Your TIN will be either a number issued by the IRS (e.g., Employer Identification Number, Federal Tax Identification Number) or a number issued by the Social Security Administration (i.e., your Social Security Number). If your TIN is a SSN, state that fact, but do NOT provide the SSN.</p>	<p>TIN # <b>RCW 42.56.230(4)</b></p>
<p>Is your firm certified as a minority or woman owned business with the Washington State Office of Minority &amp; Women's Business Enterprises (OMWBE)?</p>	<p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, provide Bidder's MWBE certification no.: <b>DBE D2F0024143   WBE W2F0024143</b></p>

BIDDER INFORMATION	
<p>Is your firm a self-certified Washington Small Business?</p> <p><i>Note: See Attachment A2 – Bidder’s Certification for criteria to qualify as a Washington Small Business</i></p> <p><i>Note: Regardless of size, a qualifying business must be owned and operated independently from all other businesses. In regard to size, the gross revenue thresholds, as reported on Bidder’s tax returns, are as follows:</i></p> <ul style="list-style-type: none"> <li>▪ Microbusiness: Annual gross revenue of less than one million dollars.</li> <li>▪ Minibusiness: Annual gross revenue of more than one million dollars, but less than three million dollars.</li> <li>▪ Small Business: Annual gross revenue of less than seven million dollars over each of the three prior consecutive years.</li> </ul>	<p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, provide the location for Bidder’s principal place of business:</p> <p>If yes, what is your business size (based on annual gross revenue)?</p> <p>Microbusiness <input type="checkbox"/></p> <p>Minibusiness <input checked="" type="checkbox"/></p> <p>Small Business <input type="checkbox"/></p>
<p>Is your firm certified as a Veteran-Owned Business with the Washington State Department of Veteran Affairs?</p> <p><i>Note: See Attachment A2 – Bidder’s Certification for criteria to qualify as a Certified Veteran-Owned Business.</i></p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If yes, provide Bidder’s WDVA certification no.</p> <p>_____</p>

CONTRACT MANAGEMENT POINTS OF CONTACT	
<p>Authorized Representative</p> <p>Name: <b>Katherine G. Boyd</b></p> <p>Email: <b>katherine@halcyonnw.com</b></p> <p>Phone: <b>360.359.0199</b></p>	<p>Contract Administrator</p> <p>Name: <b>Katherine G. Boyd</b></p> <p>Email: <b>katherine@halcyonnw.com</b></p> <p>Phone: <b>360.359.0199</b></p>

If applicable, identify any subcontractors who will perform services in fulfillment of contract requirements. State the nature of services to be performed and include a federal tax identification number (TIN) for each subcontractor. If TIN is a SSN, only provide the last four (4) digits. If a subcontractor is a certified minority or woman-owned business, small business or Veteran owned indicate that socio-economic status in the table below. Expand the table below as needed.

The bidder, by including subcontractor(s) as part of your signed proposal, agrees to assume responsibility for contract obligations and any liability for all actions of such subcontractors. The Washington Military Department reserves the right to approve or disapprove any subcontractor.

SUB CONTACTOR (IF NECESSARY)			
Legal Name and TIN#	Address	Phone and E-mail	Services/Role
Rock Harbor Consulting LLC TIN # <b>RCW 42.56.230(4)</b>	498 Lucky Dog Lane Coupeville, WA 98239	817.383.1155 mary.blake@rockharbor.biz	Project Lead - Facilities Planning & Development
Asset Management Partnership LLC TIN # <b>RCW 42.56.230(4)</b>	2748 Rex Lane, Virginia Beach, VA 23456	202.286.2003 jack.dempsey@youramps.com	Program Manager - Facilities Planning & Development

**REFERENCES**

Provide a minimum of three (3) commercial or government references for which bidder has delivered goods and/or services similar in scope as described in the Competitive Solicitation.

REFERENCE 1	
Company Name:	<b>Washington State Department of Health (WA DOH)</b>
Contact:	<b>Kirstin McFarland, Injury and Violence Prevention Section Manager</b>
Phone:	<b>360.890.6398</b>
Email:	<b>kirstin.mcfarland@doh.wa.gov</b>
REFERENCE 2	
Company Name:	<b>Washington Workforce and Education Coordinating Board</b>
Contact:	<b>Nova Gattman, Deputy Executive Director</b>
Phone:	<b>360.709.4600</b>
Email:	<b>Nova.Gattman@wtb.wa.gov</b>
REFERENCE 3	
Company Name:	<b>Washington Traffic Safety Commission (WTSC)</b>
Contact:	<b>WADE ALONZO, Program Director</b>
Phone:	<b>360.999.0842</b>
Email:	<b>walazo@wtsc.wa.gov</b>

Return this Bidder’s Profile to Procurement Coordinator at:  
contracts.office@mil.wa.gov

**Contract Issues List**

**INSTRUCTIONS.** Issues, concerns, exceptions or objections to any of the terms or conditions contained in **Attachment B1 – Proposed Contract**, must be documented by bidders in the Contract Issues List provided below. Contract Issues List frames discussions between the Washington Military Department and bidders regarding the terms and conditions contained in the contract. In completing the Contract Issues List, bidders must describe, in business terms, a concern, exception or objection and then propose a compromise that is reasonable in light of the commitment being sought by the Washington Military Department. The Contract Issues List must provide the reason or rationale supporting the issue.

- **REDLINED DOCUMENTS WILL NOT BE REVIEWED.** Do not provide a redlined contract, paragraph or clauses. Redlined text may result in the Washington Military Department making potentially inaccurate assumptions about what bidders’ specific issues or concerns might be.
- **STANDARD BIDDER CONTRACT WILL NOT BE REVIEWED.** Do not provide a copy of a bidder’s or a third party’s standard contract or proposed language in the proposal.
- **NO SUBSTANTIAL CHANGES.** Bidders are reminded that this is a competitive solicitation for a public contract and that the Washington Military Department cannot accept a proposal or enter into a contract that substantially changes the material terms and specifications published in this RFP. Proposals that are contingent upon WMD making substantial changes to material terms and specifications published in the RFP may be determined to be non-responsible. WMD will consider the number and nature of the items on the bidders’ Contract Issues List in determining the likelihood of completing a contract with a bidder.

**CONTRACT ISSUES LIST**

ITEM	REFERENCE CONTRACT SECTION #	ISSUE	BIDDER PROPOSED SOLUTION/RATIONALE
1.		<b>Not applicable.</b>	
2.			
3.			
4.			
5.			

**DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS  
FOR  
BIDDERS WHO PLAN TO UTILIZE SUBCONTRACTORS TO PERFORM THE CONTRACT, IF AWARDED**

Competitive Solicitation:	No. RFP24-001	WAARNG Real Property Development Plan / 25 Year Facilities Plan Update (2024-2049)
Bidder:	<b>Halcyon Northwest LLC</b>	
	Type/print full legal name of Bidder	

*Attachment C – Diverse Business Inclusion Plan – Subcontractors* is divided into the following three sections:

Section 1 – Provides information about WMD small and diverse business opportunities.

Section 2 – Provides instructions and information regarding who must submit *Attachment C – Diverse Business Inclusion Plan – Subcontractors* and what is required.

Section 3 – Provides the template for the *Diverse Business Inclusion Plan – Subcontractors* for the above referenced Competitive Solicitation and the information prompts that bidders, if required (i.e., bidder, if awarded, plans to use subcontractors), must complete.

**SECTION 1: WMD & SMALL/DIVERSE BUSINESSES**

As set forth in the Competitive Solicitation (see Attachment E Section B), WMD, in accordance with Washington law and to the maximum extent practicable, encourages and supports small and diverse businesses to compete for and participate in state procurements as contractors and as subcontractors to awarded bidders. See, e.g., [RCW 39.19](#) (OMWBE certified businesses); [RCW 43.60A.200](#) (WDVA certified veteran-owned businesses); and [RCW 39.26.005](#) (Washington small businesses).

For purposes of this Competitive Solicitation, the following terms have the following meanings:

SMALL/DIVERSE BUSINESS CATEGORY	DEFINITION
Minority-Owned Business:	Limited to firms certified by the Washington State Office of Minority and Women’s Business Enterprises (OMWBE) as a minority-owned business (MBE). See, <a href="#">RCW 39.19.120</a> and <a href="#">WAC 326-20</a> .
Woman-Owned Business:	Limited to firms certified by the Washington State Office of Minority and Women’s Business Enterprises (OMWBE) as a woman-owned business (WBE). See, <a href="#">RCW 39.19.120</a> and <a href="#">WAC 326-20</a> .



SMALL/DIVERSE BUSINESS CATEGORY	DEFINITION
<p>Veteran-Owned Business:</p>	<p>Limited to firms certified by the Washington State Department of Veterans Affairs (WDVA) as a Certified Veteran-Owned Business. See, <a href="#">RCW 43.60A.010(7)</a> &amp; <a href="#">RCW 43.60A.190</a>. Such firms must meet four requirements:</p> <ul style="list-style-type: none"> <li>○ <i>51% Ownership.</i> The firm must be at least fifty-one percent (51%) owned and controlled by: <ul style="list-style-type: none"> <li>▪ A veteran as defined as every person who at the time he or she seeks certification has received a discharge with an honorable characterization or received a discharge for medical reasons with an honorable record, where applicable, and who has served in at least one of the capacities listed in RCW 41.04.007;</li> <li>▪ A person who is in receipt of disability compensation or pension from the department of veterans affairs; or</li> <li>▪ An active or reserve member in any branch of the armed forces of the United States, including the national guard, coast guard, and armed forces reserves.</li> </ul> </li> <li>○ <i>Washington Incorporation/Location.</i> The firm must be <u>either</u> an entity that is incorporated in the state of Washington as a Washington domestic corporation <u>or, if not incorporated,</u> an entity whose principal place of business is located within the State of Washington.</li> <li>○ <i>WEBS Certification.</i> The firm must have certified its Veteran-Owned Business status in Washington’s Electronic Business Solution (<a href="#">WEBS</a>).</li> <li>○ <i>WDVA Certification.</i> The firm must have provided certification documentation to the WDVA and be certified by WDVA and listed as such on WDVA’s website (<a href="#">WDVA – Veteran-Owned Businesses</a>).</li> </ul>

SMALL/DIVERSE BUSINESS CATEGORY	DEFINITION
Washington Small Business:	<p>Limited to firms that meet the following three (3) requirements:</p> <ol style="list-style-type: none"> <li>1. <i>Location.</i> The firm’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.</li> <li>2. <i>Size.</i> The firm 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 the firm’s federal income tax return or its return filed with the Washington State Department of Revenue (WDOR) over the previous three consecutive years.</li> <li>3. <i>WEBS Certification.</i> Bidder must have certified its Washington Small Business status in Washington’s Electronic Business Solution (<a href="#">WEBS</a>).</li> </ol> <p>See, <a href="#">RCW 39.26.010(22) &amp; .010(13)</a>.</p> <p>Washington Small Business can also include Minibusinesses and Microbusinesses. Such firms just have a small ‘size’ requirement:</p> <ul style="list-style-type: none"> <li>▪ <i>Minibusiness Size Requirement:</i> The firm must be owned and operated independently from all other businesses and have a gross revenue of at least one million dollars (\$1,000,000) but less than three million dollars (\$3,000,000) annually as reported on the firm’s federal income tax return or its return filed with the WDOR. See, <a href="#">RCW 39.26.010(17)</a>.</li> <li>▪ <i>Microbusiness Size Requirement:</i> The firm must be owned and operated independently from all other businesses and has a gross revenue of less than one million dollars (\$1,000,000) annually as reported on the firm’s federal income tax return or its return filed with the WDOR. See, <a href="#">RCW 39.26.010(16)</a>.</li> </ul>

In support of the state’s economic goals and to support a diverse supplier pool, WMD has established the following voluntary numerical goals for WMD Competitive Solicitations:

- Ten percent (10%) Minority-Owned Businesses;
- Six percent (6%) Woman-Owned Businesses;
- Five percent (5%) Veteran-Owned Businesses; and
- Twenty-five percent (25%) Washington Small Businesses, five percent (5%) of which are microbusinesses or minibusinesses as defined in RCW 39.26.010(16) and (17).

Achievement of these goals is encouraged whether directly or through subcontractors.

**SECTION 2: INFORMATION & INSTRUCTIONS FOR COMPLETING ATTACHMENT C DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS**

1. Bidders who, if awarded a Contract, intend to use subcontractors, must complete **Attachment C – Diverse Business Inclusion Plan – Subcontractors** in the form set forth herein. Awarded bidders who do not submit a Diverse Business Inclusion Plan will be precluded from utilizing subcontractors to perform the Contract.
  - **Note:** **Attachment C – Diverse Business Inclusion Plan – Subcontractors** is NOT required if bidder, if awarded, does NOT intend to use subcontractors for this Contract.
2. As part of the **Diverse Business Inclusion Plan – Subcontractors**, bidder is encouraged to include an anticipated list of small/diverse subcontractors who may assist bidder in fulfilling bidder’s contractual obligations, if bidder is awarded a Contract pursuant to this Competitive Solicitation. This list should identify any subcontractors who are small/diverse businesses as defined above.
  - **Note:** The businesses included in the **Diverse Business Inclusion Plan – Subcontractors** are listed as examples of the businesses that bidder may use as subcontractors and does NOT obligate bidder to utilize those specific businesses in performing the Contract, if awarded. If awarded, the bidder’s **Diverse Business Inclusion Plan – Subcontractor** will be incorporated into the terms and conditions of the resulting Contract and bidder will report performance and progress to WMD as set forth in the Contract and in annual contract management meetings.
3. Bidders must describe their efforts in engaging and reducing any barriers to participation by small/diverse businesses, including outreach, education/mentorship, and process changes designed to increase small/diverse business participation.
4. If the proposed subcontractors are self-identified diverse businesses, bidder will encourage and support efforts for their certification with the appropriate Washington state agencies.
5. The small/diverse business goals set forth herein are voluntary. Bidders will not be considered non-responsive if the **Diverse Business Inclusion Plan – Subcontractors** has a zero small/diverse business participation amount. WMD, however, encourages bidders to be proactive in engaging small/diverse business participation. No preference will be included in the evaluation of bids based on the **Diverse Business Inclusion Plan – Subcontractors**. No minimum level of small/diverse business participation is required as a condition for receiving a Contract award.
6. WMD will review the **Diverse Business Inclusion Plan – Subcontractors** for a genuine effort and the maximum opportunity to contribute toward WMD aspirational goals. Awarded bidders who utilize subcontractors will meet with WMD annually regarding their small/diverse business aspirational inclusion goals and outreach efforts set forth in their **Diverse Business Inclusion Plan – Subcontractors**.



**SECTION 3: BIDDER’S DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS**

**1. BIDDER’S ANTICIPATED DIVERSE BUSINESS PARTICIPATION (GOALS)**  
 List bidder’s anticipated small/diverse business category participation goals for subcontractor participation, if bidder is awarded a Contract. Bidders may list any goal amount. These goals are aspirational goals for bidder’s use of small/diverse business subcontractors, if awarded a Contract pursuant to this Competitive Solicitation.

SMALL/DIVERSE BUSINESS CATEGORY	WMD GOALS	ANTICIPATED PERCENT OF CONTRACT AMOUNT (GOALS)
Minority-Owned Business	10%	5%
Woman-Owned Business	6%	70% (Prime Consultant Halcyon Northwest LLC is a certified WBE, and Subconsultant Rock Harbor Consulting LLC is a WBE (pending).
Veteran-Owned Business	5%	25%
Washington Small Business	25%	75%


**2. BIDDER’S DIVERSE BUSINESS SUBCONTRACTING LIST**  
 Provide the firm information of the relevant small/diverse business subcontractors that bidder anticipates utilizing, if awarded a Contract pursuant to this Competitive Solicitation. Please identify the names of the firms as they are listed in Washington’s Electronic Business Solution (WEBS) and provide the firm’s applicable certification numbers (for Minority, Woman, and Veteran-Owned firms).

STATE CERTIFICATION CATEGORY	LIST OF FIRMS
Minority-Owned Businesses	
Woman-Owned Businesses	Rock Harbor Consulting LLC. OMWBE/WEBS WBE Certification no. pending.
Veteran-Owned Businesses	Asset Management Partnership LLC. OMWBE/WEBS VOSB Certification no. pending.
Washington Small Businesses	Rock Harbor Consulting LLC. OMWBE/WEBS WBE Certification no. pending.

**3. DESCRIBE BIDDER’S PLAN TO MEET OR EXCEED BIDDER’S VOLUNTARY DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS GOALS, INCLUDING OUTREACH.**  
 Response: See next page.

**4. IDENTIFY BIDDER’S PRIMARY CONTACT FOR BIDDER’S DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS GOALS.**  
 Response: Katherine G. Boyd, CEO, Halcyon Northwest, LLC, tel (360) 359-0199, email katherine@halcyonnw.com.

Bidder commits to a make a genuine effort to achieve the proposed subcontract amounts with small/diverse business subcontractors as stated above. Bidder will develop a comprehensive outreach strategy that will engage small/diverse businesses registered with the State of Washington in WEBS.

 \_\_\_\_\_ August 30, 2023 \_\_\_\_\_

Bidder’s Authorized Representative Dated Signed

Return this Contracts Diverse Business Inclusion Plan – Subcontractors  
 to Procurement Coordinator at:  
 contracts.office@mil.wa.gov

### 3. DESCRIBE BIDDER'S PLAN TO MEET OR EXCEED BIDDER'S VOLUNTARY DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS GOALS, INCLUDING OUTREACH.

Halcyon Northwest LLC (Halcyon) is an OMWBE-certified DBE and WBE firm in Washington State. We currently subcontract many highly qualified Woman-, Minority-, and Veteran-owned small businesses as well as individuals who are women, minorities, and/or veterans. Several of the woman-owned and veteran-owned businesses on our team for this contract are in the process of acquiring their state and federal level certifications with our support, and their certification is pending as of August 30, 2023.

Halcyon plans to implement proven and vetted methods to attract and encourage more WBE, MBE, DBE, and VOSB/SDVOSB firms and individuals who are women, minorities, and veterans to join our team and partner with us on this WAARNG contract. These methods include:

**WMBE Outreach Consultant:** Ryan Taylor, a lead subcontractor of Halcyon Northwest, has a background in WMBE consulting, and has numerous relationships with Minority-, Women- and Veteran-owned business, as well as DBE-certified businesses, across Washington State. When looking to subcontract or hire for a project, we will leverage Ryan's network and outreach skills to attract and secure minority, woman, and veteran participation in the projects we work on.

**Outreach at Events:** Halcyon regularly attends meetings and events frequented by Women-, Minority-, and Veteran-owned small businesses. At these events, Halcyon announces current opportunities for subcontracting with our firm. We also ask for and review attendance lists to contact potential teaming partners.

**Outreach, Education/Mentorship, and Process Changes:** Halcyon will engage in sustained outreach to recruit minorities, women, and veterans for entry-level positions and internships, and to provide these individuals with an opportunity to become employed, learn new skills and abilities, and grow within our company. We will notify our network of WBE, MBE, and DBE organizations and announce opportunities at WMBE and DBE-based events and meetings to ensure minorities are made aware of our openings.

**Seeking Vendors:** Halcyon Northwest has a strong network of Diversity Equity and Inclusion representatives and organizations we regularly work with, including Tabor 100, National Association of Minority Contractors, and professional WMBE consultants. When we are seeking

subcontractors, we will notify the individuals and leadership of these organizations that we are hiring or seeking subcontractors and present the qualifications we are looking for.

**Outcomes:** These methods will ensure that we provide WMBE firms, DBE firms, and Veteran-owned firms with the opportunity to be notified of our open positions for employment and subcontractors. The practices will also give minority-, woman- and veteran-owned firms and individuals a thorough chance to build a relationship with our team members, and potentially secure work on a one time or continuous basis.

**Education/Mentorship:** Our goal is also to help subcontractors acquire experience and tools they need to sustain and grow their business. Halcyon will provide mentorship opportunities to WBE, MBE, and veteran-owned subcontractors for project management, contract management, and proposal writing. We will also provide internship and mentorship opportunities to individuals who work with us, to allow them to grow as project managers and in other professional roles.

**Plan Revision:** We will reassess our Diversity and Inclusion Plan regularly to strengthen it to support more WMBE/DBE firms and economically disadvantaged communities.

# Tab II

## **Technical Proposal**

- Work Plan + Schedule



## II TECHNICAL PROPOSAL - Work Plan + Schedule

### OBJECTIVE

This work plan is to develop the Washington Army National Guard (WAARNG) 25-year Real Property Development Plan (RPDP)/Statewide Facilities Plan from Fiscal Year 2024 to Fiscal Year 2049 and produce a long-range, integrated planning document to implement The Adjutant General's (TAG) goals and objectives for development and operation of the State's real property for WAARNG.

This 25-year RPDP that the Halcyon Team develops will provide WAARNG with a roadmap to meet long-term mission requirements and efficiently manage real property at ARNG installations throughout the real property life cycle. The 25-year RPDP will allow WAARNG to better allocate limited resources to help ensure that soldiers, their families, and other users of ARNG installations have suitable and safe facilities. It will identify real property deficiencies, priorities, and potential solutions, including locations to accommodate future expansion or reconfiguration. The plan will also provide recommendations for how WAARNG can improve application of their existing Geographic Information Systems (GIS) Site Development Plans (SDPs).

The Halcyon Team will develop the 25-year RPDP in conformance with National Guard Pamphlet 210-20 – Real Property Development Planning Procedures for the Army National Guard, and specifically Chapters 4-4 and 4-5. Achievement of this objective will include three phases of work: the Discovery Phase, the Development Phase, and the Finalization Phase.

### 1 | PHASE - DISCOVERY

The Discovery Phase includes project initiation / kick-off meeting. We anticipate this will be an in-person meeting at a WAARNG selected location that will be attended by the Halcyon Team within 14 days of the Notice to Proceed (NTP).

The objectives of this meeting are to:

- Introduce the team and identify key points of contact (POCs).
- Confirm contractual requirements, objectives, expectations, and obligations.
- Review project scope, schedule, objectives, and plan.
- Receive TAG vision and expectations of the RPDP.
- Inventory and review current plans and planning activities.
- Receive updated information on plans and objectives.
- Develop a detailed understanding the WAARNG's vision and mission.
- Commission the "Needs List."
- Identify key stakeholders and tentatively schedule follow-ups as needed.
- Review and affirm next steps and adjust project schedule to synchronize with WAARNG planning and budget development calendar and requirements.

During the Discovery Phase, a project management cadence call will be established. It is the Halcyon Team's plan to hold monthly meetings with the WAARNG Project Manager / Chief Facility Management Office (CFMO) representative.

#### Deliverables - Discovery Phase

The Discovery Phase will produce:

- » A final detailed work plan.
- » Project schedule.
- » Annotated outline of the 25-year RPDP within eight weeks of NTP.

## II TECHNICAL PROPOSAL - Work Plan + Schedule, continued

The objective of the monthly meetings is to:

- Review project progress in alignment with the approved project plan.
- Highlight updates made to the draft RPDP.
- Maintain the Needs List.
- Identify and mitigate project risks.

The Halcyon Team will also facilitate understanding of WAARNG’s visioning and mission process to develop a shared and detailed understanding of the RPDP)/Statewide Facilities Plan. This will include identifying critical issues, obtaining strategic direction and guidance from leadership. The visioning and mission process will allow Halcyon to develop appropriate survey instruments and methodologies for gathering information throughout the project.

## 2 | PHASE - DEVELOPMENT

The Development Phase will focus on methodical RPDP development. Work will include gathering, compiling, aggregating, and synthesizing WAARNG planning products. This includes the complete list of artifacts detailed in the subject Washington Military Departments (WMD) Request for Proposal (RFP). It will also include any new information gathered through out the contracted Period of Performance (PoP). This work will be punctuated by virtual meetings and site visits when needed.

The Halcyon Team’s plan to gather information is as follows:

- Requests for information will be catalogued and managed using the Needs List.
- Virtual meetings will be scheduled in advance to review and confirm objectives in the current planning artifacts provided. This will include informal review and discussion of draft RPDP versions.
- Virtual review sessions will be held with key stakeholders. The Halcyon Team anticipates that this will include sessions with WMD/WAARNG leadership, the CFMO, key personnel of the different directorates, and major subordinate commands.
- Information gathering related to confirmation and analysis will be streamlined through use of structured survey questions and interviews.
- Within 10 days of meetings/review sessions, Halcyon will provide inception reports documenting the results, to include the subject, the names of participants, an outline of the discussion, information requested, and recommendations or conclusions reached.

The Halcyon Team anticipates that, when advantageous, virtual meetings and review sessions will be held in-person or hybrid (e.g. a combination of in-person and virtual). In addition to the Kick-Off Meeting, the Halcyon Team anticipates that at least one review session will be organized as an in-person workshop / planning charette. This meeting would be held somewhere during the first third of the Development Phase after all planning materials have been received and substantially compiled. The objective of this meeting is to ensure clarity of TAG objectives and vision for the RPDP.

The Development Phase will progress through successive iterations of the RPDP in conformance with contract requirements and align with WAARNG planning and budget development cadence, TAG objectives, and the National Guard Pamphlet 210-20 – Real Property Development Planning Procedures for The Army National Guard.

### Strategy - Development Phase

The Halcyon Team's strategy for RPDP development is lean and focused, and includes:

- » A detailed review of planning artifacts.
- » Review and affirmation of planning source data (to include ASIP, RPLANS, PRIDE, ISR, and SMS/BUILDER data sources).
- » Clear application and statement of TAG objectives and vision.
- » Methodological and systematic development of the RPDP.

## II TECHNICAL PROPOSAL - Work Plan + Schedule, continued

Formal review submissions of the draft RPDP are as follows:

Deliverables	Delivery Timeline
Initial Draft – 35% complete	Month 4
Draft Executive Briefing/Presentation	Month 12
Final Draft – 95% complete	Month 14
Final Executive Briefing/Presentation	Month 15
Final Plan – 100% complete with hard copies	Month 16

The Development Phase will begin to transition to the next phase of work with submission of the Executive Briefing/Presentation, which will be delivered at Month 12.

### 3 | PHASE - FINALIZING THE RPDP PLAN

The Finalizing Phase will focus on RPDP polishing and it begins in earnest with development of the Final Draft. This is the concluding phase where the Halcyon Team will shift focus from the Development Phase, which was focused on WAARNG and key internal stakeholder objectives and requirements.

The Finalizing Phase will view RPDP development from an external stakeholder perspective. Development activities will continue as needed, but this phase will include specific attention on RPDP presentation to include the following:

- Clarity and impact of the TAG's message.
- Clarity and impact of objectives and supporting business case for budget and project priorities.
- Alignment with current strategic, operational, and tactical WAARNG tempo and requirements.
- Professionalization of the RPDP to include presentation and impact of the report and graphics.

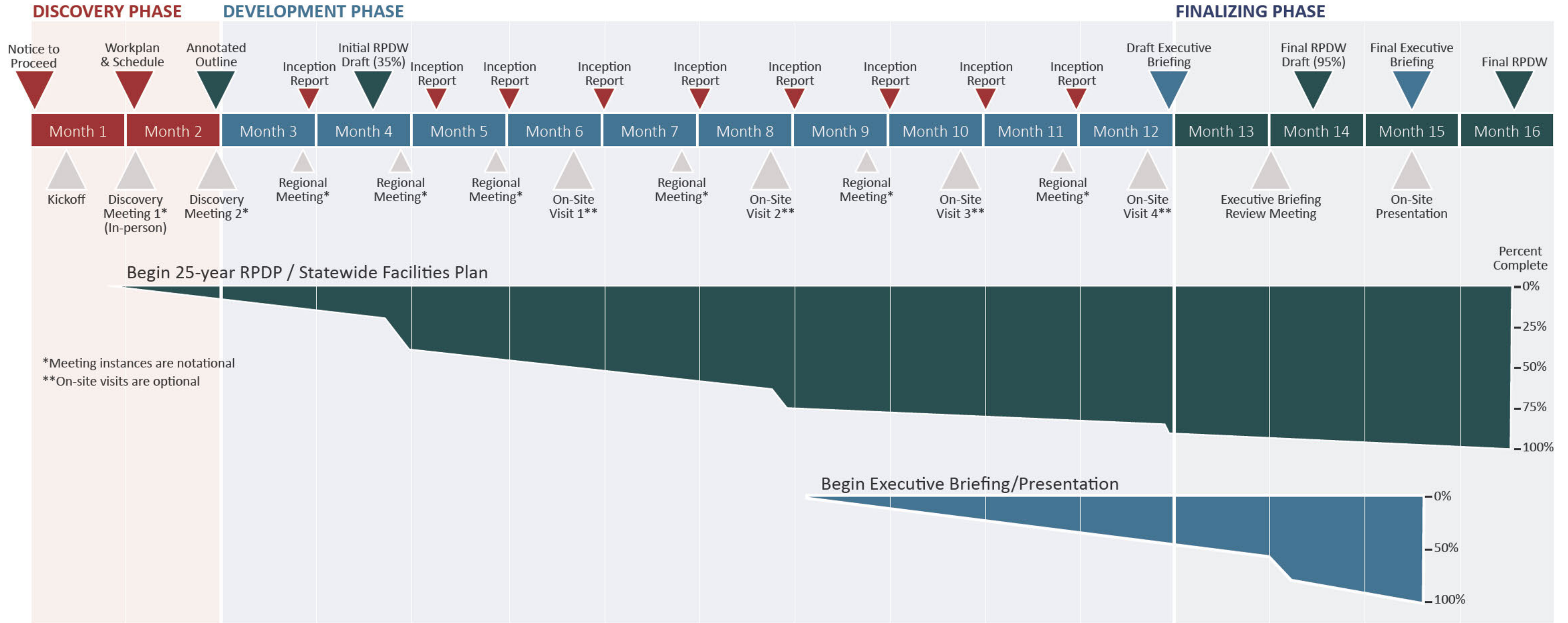
The Halcyon Team will compile the final (95%) draft and send it for review. Based on WMD's review comments, the Team will then finalize the Executive Briefing/Presentation and the final draft.

### WORK PLAN SCHEDULE

A visual representation of the timeline for project phases and tasks is on the following page.

II TECHNICAL PROPOSAL - Work Plan + Schedule, continued

**WORK PLAN SCHEDULE**



# Tab III

## **Technical Proposal**

- Key Personnel (*Org chart, bios, skills matrix, and full resumes*)

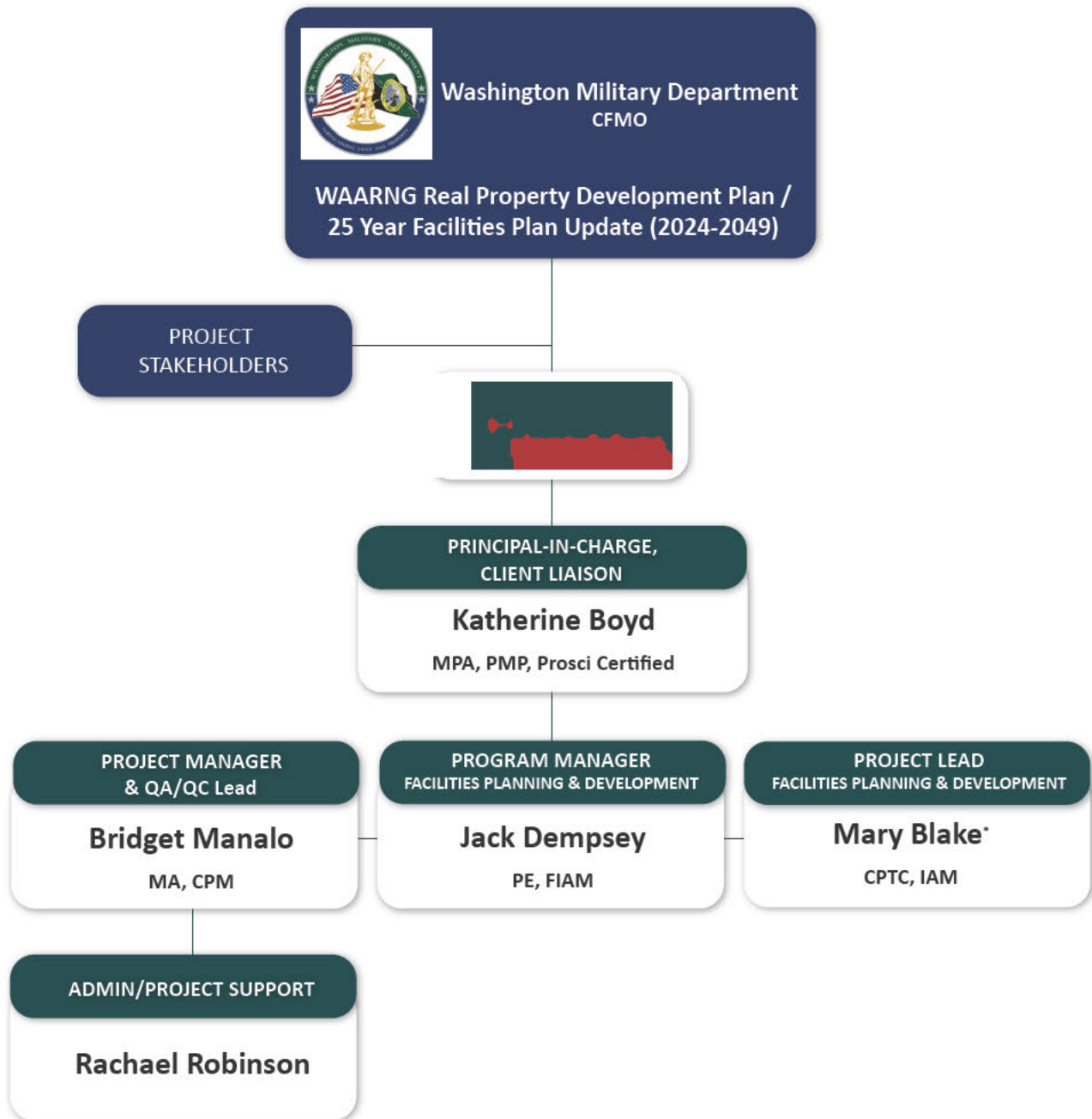
III TECHNICAL PROPOSAL - Key Personnel

**Overview**

Halcyon Northwest is an experienced Prime Contractor with the State of Washington and will manage the team of specialists who will lead the work on this facilities planning and development contract. Halcyon's strong project management approach is built on best practices, partnership-building, and bringing groups to agreement. Our two highly qualified asset management professionals are experienced in government facilities planning and development: Mary Blake of Rock Harbor, LLC, and Jack Dempsey of Asset Management Partnership, LLC. Working collaboratively with WMD, Halcyon will provide overall project management and administrative support guiding the team to a successful 25-year facilities plan development for WMD.

Summary bios and full resumes of key personnel follow.

**Team Organization Chart**



\* Mary Blake will also oversee graphic design of the final report.



## III TECHNICAL PROPOSAL - Key Personnel, continued

**OVERVIEW**

Brief summaries of our key team members are below. Our team was hand selected based on their knowledge of military processes and government facilities asset planning and management. Their full resumes follow on the next pages with additional details on their education, credentials, and professional memberships, as well as a description of specific experience in their fields.

**TEAM MEMBER SUMMARY QUALS**

- **KATHERINE BOYD, Principal-In-Charge and Client Liaison**, has almost 20 years of experience working with State of Washington government agencies, managing projects and facilitating diverse stakeholder groups on major initiatives. She was the lead project manager for the Washington Traffic Safety Commission's 2019 Strategic Highway Safety plan, Target Zero, which had over 200 stakeholders and addresses deaths and serious injuries on state highways. She also recently led a report on the health and well-being of Black Washingtonians, on behalf of Washington's Commission on African American Affairs (CAAA). She also is the project manager, researcher, and writer for the update to the Washington State Department of Health's (DOH's) Suicide Prevention Plan, which began in February 2023. A certified mediator through the King County Dispute Resolution Center, a Prosci Certified Change Manager, and a certified Project Management Professional, she uses the best practices from these professions to initiate, plan, execute, and monitor projects efficiently and effectively for her clients.

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- **BRIDGET MANALO, Project Manager and QA/QC Lead**, is a certified Project Master (CPM) with over a decade of performance as a program manager for the Department of Defense. Holding a Certified Project Master credential from the Institute of Project Management, a globally recognized certification, Bridget's professional journey is defined by a relentless pursuit of excellence. Drawing from her modeled leadership skills and experience supporting world-renowned special forces leaders, she has cultivated a profound outlook on team building and communication, gaining a well-rounded understanding of motivation and directing projects in a military setting. Bridget's leadership philosophy centers on a communications-centric approach with a strong emphasis on active listening and engagement.

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- **JACK DEMPSEY, Program Manager - Facilities Planning and Development**, has a demonstrated passion and skill for generating value for his clients through better asset management. He has a service-oriented commitment to help others and a deep love for engineering. With a masters degree in Civil Engineering and in Construction Management, he graduated from the US Coast Guard Academy and he served 21 years as an active-duty Coast Guard Officer, Administrator, and Civil Engineer. Upon retiring from the Coast Guard, he served the next 12 years as an Advisor, Director, Author, and Subject Matter Expert on asset management and technology consulting teams for projects, programs, and initiatives nationwide. Jack is an active contributor to the facility asset management professional body of knowledge on the national and international stage. He is on the National Academies of Science, Engineering, and Medicine's (NASEM) Board on Infrastructure and the Constructed Environment (BICE). This board is chartered to advise the US Legislative and Executive branches on policy and technical issues.

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- **MARY BLAKE, Project Lead for Facilities Planning and Development**, has extensive experience helping federal and municipal entities strategically manage their real property portfolios. This experience includes developing strategic plans, asset management policies, implementation strategies, mission-support business models, and assessment processes. Mary has worked with the US Department of Homeland Security, US Coast Guard, US Navy, US Air Force, and the US Army Corps of Engineers, in addition to Amtrak and other entities at the state, city, and public service level. She understands all stages and phases of organizational real property management—including multi-year capital planning, acquisition, operation and maintenance, recapitalization, and disposal—and helps organizations achieve their real property vision. She creates change management and communications materials that matriculate down from the executive level to boots-on-the-ground level, and all levels in between. Mary also uses her skills as an experienced facilitator to help organizations navigate the hard decisions involved with real property planning, ensuring the projects that “make the cut” are those most essential to the organization's mission.

III TECHNICAL PROPOSAL - Key Personnel, continued



**Katherine Boyd** PMP, MPA, PROSCI CERTIFIED

**ROLE**

*Principal-In-Charge; Client Liaison*

**RESPONSIBILITIES**

A talented, collaborative leader, project manager, and change management expert, Katherine will serve as Principal-In-Charge on this contract and oversee the team's work with key stakeholders to ensure a successful project. Under her leadership, Halcyon will track WMD goals and ensure the project schedule and budget are effectively managed. She will oversee quality assurance and provide general oversight throughout the planning and report phases.

**CAREER SUMMARY**

CEO and founder of Halcyon Northwest, Katherine has 20 years of experience as a project leader and change management expert in the public sector. With a goal of helping organizations achieve the ambitious goals that drive their missions, Katherine brings stakeholders and team members to consensus to determine, track, and achieve their visions. She regularly leads large-scale stakeholder groups to achieve strategic agreement.

**RELEVANT PROJECTS**

- Target Zero Highway Safety Plan Strategic Planning** | Washington State Traffic Safety Commission

Katherine led an 18-month long strategic planning process that culminated in Washington State's Highway Safety Plan, Target Zero. This data-driven strategic plan guides the state's traffic safety efforts. She led a diverse and wide-ranging project stakeholder engagement process, comprising a coalition of more than 100 individuals from federal, state, regional, local, and tribal governments, as well as nonprofit, advocacy, and business groups. Katherine wrote and edited the strategic plan, and managed the graphic designer who provided formatting, layout, and graphics. In addition, she helped plan and facilitate large-scale stakeholder meetings, including a 200+ person conference. In keeping with the Target Zero ethos, she promoted a collaborative spirit and a focus on a shared goal: zero deaths and injuries on Washington State roadways.
- Traffic ACTION Tracking System (TRACTS) Replacement Project** | Washington State Department of Transportation (WSDOT)

As Project Manager for this WSDOT Traffic Office initiative to replace an aging agency application with updated technology, Katherine has successfully led the project from a feasibility study through initiation, managed the execution and monitoring/controlling of the work. During the feasibility study, she conducted a series of user interviews as well as a survey to determine baseline satisfaction with the existing application. The user interviews further identified business requirements, project risks, and ideas for project governance. Katherine led weekly meetings of the User Guidance Team (UGT) to advise on development of the application, plus additional meetings for the IT Team for actual development work. The application launched successfully in 2020 to high customer satisfaction scores. It is in operational status and the UGT continues to meet quarterly.
- Land Agreement Management System (LAMS) Update, Organizational Change Management (OCM)** | State of Washington Department of Natural Resources (DNR)

As co-OCM Lead for the LAMS project, Katherine was responsible for the stakeholder outreach campaign. She wrote the LAMS project Communications plan and is implementing by developing key monthly messages, a monthly email from the project's executive sponsor, an internal Sharepoint website, and a quarterly Town Hall meeting. She gathered baseline stakeholder data on readiness for change, stakeholder knowledge, and sense of being well-communicated with, and will continue to collect that information throughout the project with user surveys. She is also providing support for the Change Champion Forum, training development, and workflow redesign.

**CREDENTIALS**

**EDUCATION**

- M.P.A., The Evergreen State College, Olympia, WA
- B.S., magna cum laude, Cornell University, Ithaca, NY

**PROFESSIONAL CERTIFICATIONS/ AFFILIATIONS**

- Project Management Professional (PMP) certification, Project Management Institute (PMI)
- Change Management Specialist (CMS), the Management and Strategy Institute
- Certified Mediator, King County Dispute Resolution Center

**CORE COMPETENCIES**

- Strategic Planning
- Organizational Change Management
- Project Management
- Conflict Resolution and Mediation
- Process Improvement
- Team Leadership
- Stakeholder Engagement & Communication
- Survey Development
- Risk Assessment & Mitigation
- Report Writing
- Data Analysis
- Policy Analysis



## RESUME, CONTINUED | Katherine Boyd

## CLIENTS SAY

- “Katherine works with a wide diverse group of people from different backgrounds, but also different skillsets. She knows how to approach people, how to meet them where they're at, and how to communicate. She listens to everyone's needs, explores possibilities, and then works through a principled process to build consensus.
- “Katherine's background and talent together make her very effective as a facilitator. She is a certified mediator, which comes through when she's facilitating a conversation over a sensitive topic where people's feelings may heat up.
- “Katherine comes in with that mix of absolute confidence and humanity. She's knowledgeable, a phenomenal facilitator, an excellent coordinator, and a great mediator. She is intuitive, noticing patterns and understanding what needs to be addressed.

- 2022 Behavioral Health Workforce Assessment** | Washington State Workforce Training & Education Coordinating Board (WTB)

Katherine developed a report for WTB to present to the Washington State Legislature on evaluating progress on increasing the behavioral health (mental health and substance abuse) workforce in Washington State. The report is lookback at progress to date on the recommendations that the workforce board had set for itself as well as recommendations for new approaches based on the most recent information and development of the field and safety. Recommendations under evaluation spanned three previous reports over six years and were grouped into six categories: Recruitment and Retention, Reimbursement, Education and Training, Licensing, Supervision, and Care Integration. The final report also contained an executive summary of the work, and a short roll up of all Legislative and other major initiatives related to each recommendation. This work was performed on behalf of a large stakeholder group called the Behavioral Health Workforce Advisory Committee (BHWAC).
- Health and Wellness Study of Black Washingtonians** | Washington State Commission on African American Affairs (CAAA)

Katherine and the Halcyon team developed a report on the health and wellness of Black Washingtonians. Using the social determinants of population health, economic stability, housing and wealth, education and child welfare, and environmental justice, Halcyon compared the outcomes of Black Washingtonians to other ethnic/racial groups within the state, looking for disparities and inequities. Research and data-gathering phases included surveys, focus groups, and expert interviews. The final report included a public-facing document for legislators, staff, and community activists to use to lobby elected officials.
- Injury and Violence Prevention Guide (IVP) Strategic Planning** | State of Washington Department of Health (WA DOH)

Katherine was the project manager, facilitator, and lead editor for this project to update the IVP's team strategic plan. In the first phase of the project, Katherine facilitated a series of meetings with IVP staff to develop the outline for the updated Guide. She also provided a final report with recommendations. In the second phase of the project, Katherine worked with IVP staff to develop an introduction, chapters, and relevant data, and edit these into the final version of the Guide.
- State Action Plan and Toolkit for Sexual Violence and Rape Prevention Education (RPE)** | WA DOH

Katherine facilitated a series of six meetings among sexual violence prevention policy leads in Washington to develop a State Action Plan for the CDC. Participants came from DOH's Injury & Violence Prevention program, the Washington Department of Commerce's Office of Crime Victims Advocacy (OCVA), and the nonprofit Washington Coalition of Sexual Assault Programs (WCSAP). Katherine helped the group coalesce around three shared focus areas, strategies to achieve them, and populations deserving of special focus due to data-supported vulnerability to sexual violence, among other elements of the plan. She helped edit the final version of the plan to deliver to the CDC.
- Stakeholder Facilitation Work for HB 1218** | WA DOH, and WA Department of Social and Health Services (DSHS)

Katherine facilitated three large-scale stakeholder meetings on behalf of DOH and DSHS, co-lead agencies for this project. Per Legislative request, the effort evaluated the effects of COVID responses at long-term care facilities, with the intention of developing effective as well as compassionate guidelines for future public health emergencies. Katherine contributed to the design of three stakeholder meetings, then facilitated the virtual conversations. The meetings addressed issues such as visitation, access to personal protective equipment (PPE), admission and discharge, the psychosocial and physical health of residents, and rapid and accurate testing for disease.

Participants included trade groups for nursing home owners, hospitals, assisted living and skilled nursing facilities, and home care and hospice, plus: public health officials, Long Term Care (LTC) residents and their family members, and LTC Ombudsmen.



III TECHNICAL PROPOSAL - Key Personnel, continued



**| Bridget Manalo** MA, CPM

**ROLE**  
*Project Manager and QA/QC Lead*

**RESPONSIBILITIES**  
Lead QA/QC across all phases of the work, collaborating closely with Principal and Project Lead to align efforts.

**CAREER SUMMARY**  
Bridget is a certified Project Master (CPM) with over a decade of experience leading intricate projects and programs for government agencies. She excels in scoping projects, team development, process enhancement, risk evaluation, and program advancement. Adept at communication and mentorship, she forges robust relationships, fosters collaboration, and achieves outcomes within diverse settings.  
Committed to equity, she enhances program objectives through attentive listening and engagement, backed by 20+ years of service across military, civilian, and non-profit sectors, driving community development partnerships.

**CREDENTIALS**

- EDUCATION**
- Currently pursuing MBA in Organizational Leadership; Eastern Washington University, Cheney, WA
  - M.A., English and Creative Writing, Central Washington University, Ellensburg, WA
  - B.S., Aviation Technology, Everglades University, Boca Raton, FL

- PROFESSIONAL CERTIFICATIONS/ AFFILIATIONS**
- Certified Project Master (CPM), Institute of Project Management, Global Accreditation
  - Member, Project Management Institute, Puget Sound Chapter

**MILITARY SERVICE | AWARDS**

- Active-Duty Military Service, Jul 1995- May 1998, US Army. AH-1F Helicopter Repairer; Honorable Discharge
- 2019 DA Commanders Award for Civilian Service (awarded by the 1SFG(A) Commander)
- 2017 Special Forces Command Civilian of Excellence Award (awarded by Major General Francis Beaudette 1SFC)
- 2017 DA Commanders Award for Civilian Service (awarded by Major General Francis Beaudette 1st SFC)
- 2014 DA Commanders Award for Civilian Service (awarded by 1st SFG(A) Commander)
- 2011 DA Achievement Metal for Civilian Service (awarded by 1EN BN Commander)
- 2010 DA Commander's Award for Public Service (awarded by 1st Space BDE Commander)

**PROFESSIONAL EXPERIENCE**

- **1st Special Forces Group (Airborne) Family Readiness Support** | US Army, Joint Base Lewis McChord, WA  
Over a decade at Joint Base Lewis McChord (JBLM), WA, Bridget drove Army initiatives, exemplified by:
  - *Program Management Excellence:* As a dedicated Program Manager, Bridget oversaw a diverse portfolio of critical Family Programs, including Family Readiness Groups, Care Teams, Gold Star Programs, Mentorship Programs, and Deployment and Homecoming Readiness initiatives. Her meticulous oversight ensured the seamless coordination of these programs, directly impacting soldiers and their families.
  - *Enhancing Chaplain Functions:* Bridget amplified the effectiveness of Chaplain functions within the program. She adeptly managed functions related to Casualty Assistance, Non-Profit Grants, Single Soldier Events, and Family Retreats, contributing to the holistic well-being of military personnel and their families.
  - *Project Leadership:* Bridget led complex, multi-stakeholder projects that enriched the Special Forces community experience. She spearheaded events such as Volunteer Awards Ceremonies, Kids Q-Course Obstacle Courses, Family Organizational Day Events, Back to School School Supplies Events, Fall Festivals, Unit History Week, and Formals, creating opportunities for bonding, growth, and camaraderie.
  - *Resourceful Budget Management:* With her financial acumen, Bridget navigated the intricacies of budget acquisition and management. She secured funding through various channels, including fundraising, grants, military contracts, and procurement. Her strategic prowess ensured that all programs and events were adequately funded to meet their objectives.
  - *Innovative Mentorship Program Funding:* Bridget's visionary leadership resulted in securing up to 500K per year through Congressional Budget Acquisitions for the Mentorship Program. Her collaboration with Volunteer Spouses and Military Partners led to the development of a pioneering program that aligned seamlessly with the goals of the organization and the broader military community.
  - *Volunteer Empowerment and Resilience Building:* As a mentor and trainer, Bridget instilled a sense of purpose in volunteers and championed team building and recruitment efforts. Her dedication ensured sustained volunteer engagement, which contributed to the continuity and success of the programs she managed.
  - *Strategic Partnerships and Compliance:* Bridget forged robust relationships with agencies, programs, non-profits, businesses, and the military, fostering a resilient Special Forces community. Her strategic approach included meticulous planning to achieve 100% compliance with standards, as evidenced by successful inspections and audits by the Inspector General.



III TECHNICAL PROPOSAL - Key Personnel, continued

CLIENTS SAY

“ Ms. Manalo fostered collaborative teamwork and created a phenomenal network of support within 2nd BN. She not only built teams who delivered critical resources when needed most, she empowered them and set conditions for them to operate proactively.

— Commander’s Award for Civilian Service

“ Bridget consistently displays knowledge, skill, passion, and integrity in all of her endeavors. In my eight years working with her, she successfully led a variety of key change initiatives, managed projects and programs, and always kept an eye on process improvement along the way. Her willingness to either lead or to be part of a team shows her ability to adapt and collaborate as the situation dictates. It was an honor to work with her, and I still look to her for inspiration and advice!

— Cinda Doggett, F.I.R.S.T Spouse Mentorship President, DOL Coach Instructor, CEO Pacific Northwest Homebuyer

CORE COMPETENCIES

- Strategic Planning & Execution
- Budget Management & Resource Optimization
- Team Leadership & Collaboration
- Stakeholder Engagement & Communication
- Process Streamlining & Optimization
- Risk Assessment & Mitigation
- Technical Expertise & Implementation
- Innovative Resource Acquisition
- Effective Documentation & Reporting
- Diversity & Inclusion Champion
- Interdisciplinary Collaboration Facilitation
- Environmental Impact Management

RESUME, CONTINUED | **Bridget Manalo**

• **1st Engineering Battalion, 555 EN BDE Family Readiness Support | US Army, Fort Riley, KS**

During her tenure at Fort Riley, Kansas, Bridget played a pivotal role in administering five volunteer programs and driving resiliency events. This experience showcased her exceptional abilities to foster community engagement and promote well-being.

- *Strategic Volunteer Program Management:* Guided by military guidelines and regulations, Bridget skillfully steered volunteer programs and projects. She adeptly staffed volunteer positions, ensuring a well-rounded team to fulfill crucial roles and maintaining program continuity to uphold consistent support for military personnel and their families.
- *Deployment Support and Workshops:* Bridget's commitment extended to the management of pre-deployment briefings and reintegration workshops. By effectively managing and staffing these events, she facilitated the dissemination of vital information and resources to families, fostering a smoother transition for soldiers returning from deployment.
- *Educational Outreach and Family Services:* Bridget took a proactive role in educating soldiers and families about available services and volunteer requirements. Her efforts contributed to greater awareness and utilization of resources, enhancing the overall well-being of military families.
- *Community Building and Welcome Home Initiative:* Bridget orchestrated the planning of a special welcome home dinner for soldiers and their families, sponsored by the Beef Brigade. This initiative not only provided a sense of belonging but also demonstrated her commitment to fostering a supportive and connected community environment.
- *Exceptional Inspection Achievements:* Under Bridget's adept leadership, all five volunteer-led programs achieved a noteworthy 100% inspection rating. Her meticulous attention to detail and rigorous adherence to standards set a high benchmark for program excellence.

• **Heavy Vehicle Mechanic | Lear Siegler Services, Inc./URS Corp., Fayetteville, NC**

Contributing to the 82nd Airborne during a critical deployment phase, Bridget showcased her technical mastery as a mechanic while serving soldiers and LSI teams at Fort Bragg. This experience highlights her integral role in maintaining operational efficiency and readiness.

- *Precise Equipment Evaluations and Repairs:* Bridget conducted meticulous evaluations and executed skilled repairs on diverse military vehicles, including diesel MTV, LMTV, HUMMV, heaters, and generators. Her proficiency ensured the functionality and safety of these critical assets, contributing directly to operational readiness.
- *Collaboration with Soldiers and Support Teams:* Operating in close coordination with soldiers, Bridget seamlessly integrated into the team, providing hands-on assistance whenever needed. Her collaboration fostered an environment of mutual support and efficiency, reinforcing mission success.
- *Adherence to Technical Manuals:* Bridget upheld the highest standards of technical excellence by meticulously referencing and adhering to the technical manuals provided by the Department of Defense. This commitment ensured that her work was aligned with established protocols, contributing to the reliability of the equipment she worked on.
- *Vehicle Operation Expertise:* Maintaining her license to drive HUMMV and LMTV vehicles, Bridget demonstrated her comprehensive skillset and commitment to being a valuable asset across various aspects of the operation. Her versatility added to the team's capabilities.
- *Environmental Hazard Management:* Bridget's deep understanding of environmental hazards played a pivotal role in ensuring the proper handling, use, and disposal of petroleum products. By prioritizing safety for personnel, equipment, and the environment, she upheld responsible practices in all her tasks.
- *Effective Teamwork and Professional Interpersonal Skills:* Beyond technical competence, Bridget leveraged her adeptness at teamwork and interpersonal skills. Her ability to collaborate seamlessly and communicate effectively enhanced the overall cohesion of the team and contributed to a positive working atmosphere.



## III TECHNICAL PROPOSAL - Key Personnel, continued



**Jack Dempsey** PE, FIAM



#### ROLE

#### *Program Manager - Facilities Planning & Development*

#### RESPONSIBILITIES

An internationally-known expert in asset management with 20+-years of comprehensive experience in all areas of facility and asset planning, Jack will provide strategic guidance and program oversight over for development of the work plan, schedule, and other deliverables.

#### CAREER SUMMARY

Jack has 32 years of experience as an Asset Manager. Prior to forming his company *Asset Management Partnership LLC*, a Veteran-Owned Small Business, Jack's career in the military served 21 years as an active-duty Coast Guard Officer, Administrator, and Civil Engineer. Upon retiring from the Coast Guard, he served the next 12 years as an advisor, director, author, and Subject Matter Expert (SME) on asset management and technology consulting teams, projects, programs, and initiatives nationwide.

He currently serves on the National Academies of Science, Engineering, and Medicine (NASEM) Board on Infrastructure and the Constructed Environment (BICE) advising the US Legislative and Executive branches on policy and technical issues. Also at NASEM, he is Vice Chair leading a seminal study focused on improving US Federal Facility Asset Management policy and methods. In addition, he is a committee member evaluating the performance of National Institute of Standards and Technology (NIST) facility capital investments.

Over the last 12 years, he has focused on the integrated development and implementation of asset management and digital transformation solutions, generating value for clients and organizations. During this time, he has served as a director with two private consulting companies' *Asset Management Practices: Jacobs Global Buildings' Strategic Asset Management Consulting Practice*, and *Definitive Logic Asset Management Practice*. In these roles, he supported public and private organizations including the US Department of Defense, international companies, and municipal governments achieve asset management and digital transformation breakthroughs and impactful change.

With his own firm, a veteran-owned small business (VOSB), he continues to apply his passion for generating value through asset management by helping asset-intensive organizations and the professionals that serve them achieve their goals.

#### CREENTIALS

##### EDUCATION

- M.S. Civil Engineering, University of Illinois, 2000
- M.S. Construction Management, University of Washington, Seattle, WA, 1998
- B.S. Civil Engineering, US Coast Guard Academy New London, CT, 1990

##### REGISTRATIONS & CLEARANCES

- Professional Engineer (PE), State of Illinois, License #062054459
- Department of Defense Top Secret Clearance
- Fellow, Institute of Asset Management (FIAM) , #5006235

##### PROFESSIONAL LEADERSHIP

- National Academies of Science, Engineering and Medicine (NASEM)
  - Member, Board on Infrastructure and the Constructed Environment
  - Vice Chair, Committee on Strategies to Renew Federal Facilities
  - Member, Committee on Assessment of NIST Capital Facility Needs
- ISO Technical Committee (TC) 251 on Asset Management
  - Convenor/Member/Head of US Delegation, ISO TC 251
  - Member US ANSI/ASTM Technical Advisor Group to ISO TC 251
  - ISO TC 251 Liaison to ISO TC 267 on Facility Management
- Asset Leadership Network
  - Member, Board of Directors
  - Senior Fellow

#### ASSET MANAGEMENT PROJECTS

- Army Work Plan Evaluation Tool Development, US Army Corps of Engineers (USACE) Engineer Research and Development Center (ERDC) Construction Engineering Research Laboratory (CERL) | with *Definitive Logic*
- Army Facility Investment Analytics for USACE ERDC CERL | with *Definitive Logic*
- Army Mission Dependency Index Pilot for USACE ERDC CERL | with *Definitive Logic*
- Army Enterprise Installation Asset Management Maturity Assessment | with *Definitive Logic*
- Army SMS/BUILDER and Installation Status Report (ISR) Integration | with *Definitive Logic*
- Air Force Installation Strategic Asset Management Plan | with *Definitive Logic*
- Air Force Enterprise Installation Asset Management Maturity Assessment | with *Definitive Logic*
- Air Force Mission Dependency Index Database | with *Definitive Logic*
- DHS Real Property Asset Management Program Development | with *Definitive Logic*
- Air Force Comprehensive Planning Platform | with *Definitive Logic*
- US Coast Guard Shore Infrastructure Asset Management Program | with *Jacobs*
- US Coast Guard Installation Asset Management Maturity Assessment | with *Jacobs*
- Air Force Tactical Mission Dependency Index Development & Deployment | with *Jacobs*
- Army National Guard Readiness Center Transformation Master Plan | with *Jacobs*
- USACE Hydropower Maintenance Management Strategy | with *Jacobs*
- Guam Waterworks Authority Asset Management Program | with *CDM Smith*
- Renewable Water Resources (Greenville, SC), Asset Management Program | with *CDM Smith*
- USACE Capital Stock Analysis | with *CDM Smith*



## III TECHNICAL PROPOSAL - Key Personnel, continued

## ADDITIONAL EXPERIENCE

## US COAST GUARD ASSIGNMENTS

(hands-on asset management)

- Business Operations & Standup, Shore Infrastructure Logistics Center, Norfolk, VA
- Mission Support Business Model Modernization Officer, Washington, DC
- Executive Officer, Base Alameda, CA
- Executive Officer, Civil Engrg. Unit, Oakland, CA
- Staff Officer, Office of Civil Engineering, Washington, DC
- Facility Manager, Air Station Cape Cod, MA
- Construction Manager, Facility Design & Construction Center Pacific, Seattle, WA
- Construction Manager, Civil Engineering Unit, New York, NY
- Deck Watch / Law Enforcement / Weapons Officer, USCGC TAHOMA, New Bedford, MA

## RESUME, CONTINUED | Jack Dempsey PE, FIAM

## CONTRIBUTIONS IN PUBLICATIONS

- **National Academies of Science, Engineering, and Medicine**
  - Vice Chair/Coauthor, Strategies to Review Federal Facilities (to be published 2023)
  - Coauthor, Technical Assessment of the Capital Facility Needs of NIST (to be published 2023)
  - Contributor, Predicting Outcome of Investments in Maintenance & Repair of Federal Facilities (2012)
  - Expert Source, Investments in Federal Facilities: Asset Mgmt. Strategies for the 21st Century (2004)
  - Contributor, Key Performance Indicators for Federal Facilities (2004)
- **ISO Technical Committee 251 responsible for ISO 55000 – Asset Management System Standards**
  - Convenor, Product Improvement Workgroup from 2015 to 2020
  - Contributor and Author to the following standards to be released in 2024:
    - ◊ ISO 55000 – Asset Management Overview, Principles, and Terminology
    - ◊ ISO 55001 – Asset Management System Requirements
    - ◊ ISO 55011 – Guidance for Development and Application of Public Policy to Enable Asset Management
    - ◊ ISO 55012 – Guidelines on People Involvement and Competence
    - ◊ ISO 55013 – Guidance on the Management of Data Assets
  - Contributor, ISO 55010 – Guidance on the Alignment of Financial and Non-Financial Functions in Asset Management (2019)
  - Contributor, ISO 55002 – Guidelines for the Application of ISO 55001 (2018)
  - Coauthor, Managing Assets in the Context of Asset Management paper (2017)
- **US Governmental Accountability Office (GAO)**
  - Expert Source, GAO-19-57: Federal Real Property Asset Management – Agencies Could Benefit from Additional Information on Leading Practices
- **APPA – Association for Higher Education Facility Engineers**
  - Coauthor, ANSI/APPA TCO 1000 – Total Cost of Ownership: Key Principles (2017)
  - Coauthor, Buildings: The Gifts that Keep on Taking – A Framework for Integrated Decision Making (2007)
- **ASME – American Society of Mechanical Engineers**
  - ASME – Asset Integrity Management for Critical Infrastructure, member of convening committee organizing the ASME-AIM-CI conference scheduled for January, 2024
  - ASME – Innovation Technologies Institute: Coauthor, Optimizing Infrastructure Investment for the 21st Century (2009)

## SIGNIFICANT WORK PRODUCTS AND BREAKTHROUGH CAPABILITIES

- **Mission Dependency Index (MDI)**
  - Co-Creator of the MDI, deployed across Navy, Coast Guard, and NASA (2000-2004)
  - Created the Strategic MDI (S-MDI) for Coast Guard (2005-2006)
  - Created the Operational MDI (O-MDI) for Army National Guard (2013-2014)
  - Created the Tactical MDI (T-MDI) for Air Force (2016-2017)
  - Continuing to lead MDI advancements for several organizations
- **Building Information Modeling**
  - Invited by National Institute for Building Science (NIBS) to present on an agency-wide Building Information Model Strategy to the High Performance Buildings Congressional Caucus Coalition (2009)
  - ENR Article – Coast Guard Pilot Project Casts Wider Net for Data (2003)
- **Integrated Decision-Making Frameworks**
  - Created the Operational Readiness Index for the Army National Guard – Readiness Center Transformation Master Plan (2014) submitted to the Senate Armed Services Committee
  - ENR Op-Ed – With ISO 55000 Standards, Asset Management as a Discipline Will Take Center Stage (2014)
  - Made material contributions to USACE Sustainment Management System (SMS) / BUILDER (1999-2000)

## III TECHNICAL PROPOSAL - Key Personnel, continued



**Mary Blake** CPTC, IAM

**ROLE****Project Lead - Facilities Planning & Development****RESPONSIBILITIES**

As a specialist in real property and asset management for government agencies, Mary will lead the Facilities Planning & Development efforts on this contract for WMD. She will be responsible for client-facing communications and development of deliverables, with support from the Program and Project Managers.

**CAREER SUMMARY**

Mary Blake of **Rock Harbor Consulting** brings over 30 years of experience in technical writing, communications, change management, and organizational process improvement, primarily in the Federal and Department of Defense (DoD) space.

Mary specializes in the areas of real property and asset management. On a recent contract holder with the US Department of Homeland Security (DHS), she is supporting their facility transformation initiatives. Mary spent the previous eight years helping the US Coast Guard develop their real property policy and document the varied and complex processes surrounding real property acquisition, management, sustainment, and disposal.

**CREDENTIALS****EDUCATION**

- B.A. English and Geology (double major), Texas Christian University, Fort Worth, TX, 2004

**CERTIFICATIONS**

- Certified Professional Technical Communicator (CPTC), Society for Technical Communication, 2017
- Institute of Asset Management (IAM) Certificate, 2022
- GlobeSmart Certified Coach, 2021

**MEMBERSHIPS**

- Institute of Asset Management (IAM)
- Society for Technical Communication (STC)

**CORE COMPETENCIES**

- Technical writing and editing
- Communications consulting
- Process improvement
- Change management
- Project management
- Stakeholder engagement
- Asset management
- Real property management
- Lean/Six Sigma
- ISO 55000 series of Asset Management Standards

**RELEVANT PROJECTS**

- **US Department of Homeland Security (DHS), Real Property and Asset Management program (current)**

This contract provides management support, technical expertise, and engineering services to support DHS's efforts to enhance oversight of the Components' asset management programs at the Department level, and support initiatives within the Department to increase unity of effort through the integration of mission support activities.

Mary provides strategic communications support to the recently created Portfolio Transformation Office, which reports to the Office of the Chief Readiness Support Officer. Mary has created communications and change management materials, and has aided the Department to document and communicate the value of their current facilities transformation efforts.

- **US Coast Guard, Asset Management Support Services (2014 – 2023)**

This project developed and implemented a comprehensive mission-support business model, asset management system, and real property program to manage the Coast Guard's shore infrastructure portfolio. *This portfolio contains more than 40,000 facilities, structures, and aids to navigation, which are collectively valued at over \$20 billion.*

At the beginning of this project, Mary developed Change Management products to drive implementation of the Coast Guard's new Shore Infrastructure Mission Support Business Model (SIMSB). These products included a graphical representation of the model, Microsoft Word templates for Shore Infrastructure Logistics Center (SILC) technical orders, infographics explaining the the SILC's structure and responsibilities, and an inaugural SILC Annual Report. These products are still being used every day at the SILC.

Mary worked with stakeholders at Coast Guard headquarters to rewrite their Real Property Management Manual. This manual establishes the Coast Guard's policy in compliance with multiple federal and DHS mandates for real property and required considerable coordination with stakeholders at all levels of the organization to ensure this compliance fit within established real property management procedures.

Mary also worked with stakeholders at the SILC Real Property Branch to write Process Guide Technical Orders to instruct personnel in how to acquire, manage, and dispose of Coast Guard real property.



## III TECHNICAL PROPOSAL - Key Personnel, continued

RESUME, CONTINUED | **Mary Blake** CPTC, IAM

## CLIENTS SAY

“*Mary Blake does a great job developing alternative presentation formats. One testament to the high quality of graphics produced by Jacobs is the 11 by 17 graphic showing the asset classes which is hanging on the walls of many Coast Guard staff offices.*

— **Fred Sommer, US Coast Guard, Deputy Director Shore Infrastructure Logistics Center, Engineering Services Division**

“*The training sessions [developed by Mary Blake] are excellent and the instructors are very good at explaining scenarios and real life situations. Well worth the investment in training time!*

— **Sharon F. Hagggett, Program Development Branch, Civil Works Program Integration Division US Army Corps of Engineers**

*I know we're not yet finished with the GLWA project, but I don't want to wait to express my sincere gratitude for your initiative and willingness to go above-and-beyond to make this project successful. I continue to be greatly impressed by your professionalism and your consistently positive and can-do demeanor. You have great insight and a wonderful sense of humor as well.*

*It's a pleasure to work with you!*

— **Alan B. Ispass, PE, BCEE, Senior Fellow, Jacobs**

“*Great job! Your leadership and overall professionalism continues to shine through and shed light on us all.*

— **Jeff Fitzgerald, PhD, Jacobs**

• **Amtrak – National Railroad Passenger Corporation, Stations & Facilities State of Good Repair Assessment, 2017 – 2022**

This project provided facility condition assessment services for hundreds of Amtrak station and yard sites across the nation to assess the integrity and state of repair of Amtrak's building and systems.

Mary implemented extensive process improvements for report development. At the beginning of this project, reports were developed by manually creating infographics and by copying and pasting data from Excel to a Word template. Mary implemented a process to track each report's completion status. Over time, she developed and implemented more and more automated functions, and when she left the project, the tasks of populating the report and creating the infographics were almost completely automated.

• **US Army Corps of Engineers, Civil Works Asset Management, 2015 – 2019**

This project established and implemented a new budget development process defining how USACE Civil Works analyzes and prioritizes their operations and maintenance (O&M) budget.

Mary served as the client-facing project manager and created numerous deliverables to transition USACE Civil Works to the new process, including training videos, a variety of communications materials, communications plans, and data analysis reports.

• **United States Air Force Installation and Mission Support Center, Mission Dependency Index (MDI) Re-baselining, 2017 – 2018**

The USAF reassessed the Mission Dependency Index (MDI) scores at all bases across their worldwide portfolio. MDI is an indicator of how important an asset is to the mission of those who use the asset. MDI is one of the indices used by the Air Force to calculate and prioritize capital planning and O&M expenses.

At the beginning of this project, Mary developed training materials for Air Force leaders and participants in the re-baselining project. Training materials included handouts, presentations, and informational videos. Mary also developed the template and initial reports for the project and worked with stakeholders to create the Air Force's MDI Playbook.

• **City of Billings Public Works Department, Asset Management Program, 2020 – 2021**

This project performed an asset management maturity assessment and developed a Strategic Asset Management Plan for the City of Billings Public Works Department. The project identified improvement initiatives, developed an implementation strategy, implemented a change management communications plan, and trained staff.

Mary worked with stakeholders to develop the Strategic Asset Management Plan and created training material for a series of interactive workshops with client stakeholders, covering:

- Asset management drivers, stakeholders, and objectives
- Service levels and performance management
- Risk management
- Staff asset management training
- The asset life cycle
- Financial strategies
- Asset data and technologies

• **Great Lakes Water Authority, Asset Management Planning, 2019 – 2020**

This project assessed the Great Lakes Water Authority (GLWA) asset management maturity, including industry benchmarking and a gap assessment, and delivered a Strategic Asset Management Plan, Asset Management Roadmap, and Implementation Plan. Mary developed training materials to help GLWA's employees understand and utilize asset management principles. Mary also developed the template for GLWA's Strategic Asset Management Plan, which established the foundational strategy for GLWA to manage its infrastructure over the next 10 years.

• **Los Angeles World Airports (LAWA), Strategic Asset Management and Total Cost of Ownership Initiative, 2017 – 2019**

LAWA wanted a strategic approach to asset management that integrated industry best practices. Mary helped stakeholders develop a Strategic Asset Management Plan to guide the daily activities of the Asset Management Program in alignment with LAWA's strategic goals. She developed training materials and other change management communications materials that helped LAWA successfully integrate the Asset Management Program into the company's culture.

# Tab IV

## **Technical Proposal**

- Relevant Projects

*Halcyon Northwest (3 examples), Asset Management Partnership (2 examples), Rock Harbor Consulting (3 examples)*

## 1 | Target Zero - 2019 Strategic Highway Safety Plan

### Washington State Traffic Safety Commission (WTSC)

#### OVERVIEW

Halcyon Northwest (Halcyon) led an 18-month-long project to develop a strategic plan for a major, high-profile Washington State initiative. This data-driven strategic plan, written by and for policy practitioners, is intended to guide the state's traffic safety efforts for a three-year or longer period.

The project involved over 100 federal, state, regional, local, and tribal governments, as well as non-profit, advocacy, and business groups. This was the fifth iteration of this 20-year-old plan. The plan adapts and evolves over time, promoting both time-honored best practices, as well as new approaches emerging from technology and social changes.



#### KEY ELEMENTS

CONTRACT DATES: Apr 2018 – Sep 2019

CONTRACT VALUE: \$145,000

OWNER: Washington Traffic Safety Commission (WTSC)

CONTACT: Wade Alonzo, Program Director  
walonzo@wtsc.wa.gov.....360.725.9875

#### WORK SCOPE

- **Project Management.** Halcyon brought a rigorous PMP best-practices approach to the management of the project. The team created a charter and a communications plan; meanwhile, monthly reports tracked milestones/deliverables, risks, opportunities, and lessons learned. Halcyon also led the creation of a new Communications Team, which client staff eventually took over and continued past the end of the project.
- **Facilitation.** Halcyon coordinated monthly project team meetings of around 20 people, quarterly steering committee phone-in meetings of around 15 people, and monthly co-sponsor meetings that included around five people. The meeting focuses were providing information, getting groups to give clear guidance for the plan, and clarifying decisions and intended outcomes.
- **Qualitative Research.** Halcyon conducted multiple research studies during the project and provided reports on the outcomes of the research Studies included:
  - User survey
  - Stakeholder interviews
  - Conference event that included in-conference surveys and post-conference customer experience survey
  - Literature review of the other state plans to inform implementation of the plan
  - Survey of local elected officials
- **Writing and Editing.** Halcyon served as lead editors and writers for the strategic plan. They edited chapters prepared by subject matter experts and wrote several chapters. This work focused on standardizing chapter contents, consistently promoting the most useful immediate countermeasures, and finding a common voice. Each chapter explores the cause in depth, examines the data for root causes, and describes the highest-priority interventions for the coming three to five years
- **Conference Planning.** Halcyon planned and facilitated the Partner Meeting, a one-day event designed to share information on key issues, solicit stakeholder feedback, and build a shared sense of purpose for the strategic plan. Over 200 people representing 100 organizations attended the event, which included six breakout sessions on emerging traffic safety topics in Washington State.

The team used a polling tool, Poll Everywhere®, to collect input and share it in real-time with the audience. Halcyon provided a final report showing all input received from the Poll Everywhere® tool and an updated final report detailing how this input had been used to inform the content of the strategic plan.

#### RESULTS

- **Strategic Plan.** The Target Zero Plan was signed by the Governor, printed and published, and was used to set strategy and allocate resources for traffic safety over the next three to five years.
- **Priority Goals.** Coalesced coalition leadership around three overarching priority goals to focus on in the next three to five years.
- **Strategic Planning.** Halcyon used goal setting, analysis, and strategy formation to develop the plan. When the project ended, WTSC continued with strategy monitoring and implementation.
- **Group Cohesiveness.** More than 200 people, representing 100 federal, state, regional, local, and tribal governments, non-profits, advocacy groups, and companies contributed to the plan. Halcyon listened, incorporated ideas, and ensured commitment to the plan.
- **Close-Out process.** Halcyon performed a detailed close-out process, including lessons learned, documenting the update process, succession planning, and a retrospective with the sponsors.





## 2 | Health and Wellness Study of Black Washingtonians

### Washington State Commission on African American Affairs (CAAA)

#### OVERVIEW

Halcyon Northwest (HNW) developed a report on the health and wellness of Black Washingtonians. Using the social determinants of health, HNW compared the outcomes of Black Washingtonians to other ethnic/racial groups within the state, looking for disparities and inequities.

Five social determinants of health were used:

1. Population health
2. Economic stability, housing and wealth
3. Education and child welfare
4. Environmental justice
5. Justice, civil rights, and safety.



Washington State Commission On

**African American Affairs**

#### KEY ELEMENTS

CONTRACT DATES: Jun 2022- Apr 2023

CONTRACT VALUE: \$470,000

OWNER: Washington Commission on African American Affairs (CAAA)

#### WORK SCOPE SUMMARY

- **Project Management.** Using project management best practices, Halcyon created a charter, stakeholder register, a timeline, and an issues and risk register.
- **Secondary Research.** Halcyon used data from the Centers for Disease Control and Prevention (CDC), the Washington State Department of Health (DOH), and other national and state sources to understand the state of the health and wellness of Black Washingtonians, looking across a ten-year year horizon for 50 measures, including disparities and inequities.
- **Primary Research.** HNW performed an extensive primary research phase which included a survey, a series of focus groups, and expert informant interviews.

#### RESULTS

- **Final Report.** Completed on time and within budget, the report will be used to support policy and funding requests to advance the health and wellness of Black Washingtonians.

## 3 | Injury and Violence Program (IVP), Strategic Planning

### Washington State Department of Health (DOH)

#### OVERVIEW

Halcyon Northwest project managed both phases of a two-part project for the State DOH to develop a new strategic plan for eliminating preventable death and disability due to injury and violence and reducing injury risk in Washington State.

The data gathered identified prevention priorities and developed interventions based on best practices. Areas for prevention programs targeted motor vehicle safety, older adult falls, unintentional poisoning, drowning, suicide, sexual violence, and child abuse.

#### WORK SCOPE SUMMARY

Katherine facilitated the strategic planning process, and a year later, project managed the assembly and editing of the published Guide.

- **Part 1 tasks included:**
  - Developed agendas for meetings.
  - Led discussions and ensured key questions were addressed.
  - Provided detailed notes for contributors to track decisions.
  - Produced a final report of the strategic planning process and recommendations for developing the plan.
- **Part 2 tasks included:**
  - Advised on key themes and content.
  - Worked with the authors to assemble and edit all chapters.



#### KEY ELEMENTS

CONTRACT DATES: 2018; and 2019-2020

CONTRACT VALUE: \$17,000

OWNER: Washington State Department of Health (DOH)

CONTACT: Katharine Flug, MPH, formerly CORE SVIPP Program Manager  
kflug@gmail.com, 425.492.6300

#### RESULTS

A five-year strategic plan to guide the work of the Injury and Violence Prevention Program.



## 4 | Army National Guard Readiness Center Transformation Master Plan (RCTMP) US Army National Guard Bureau

### OVERVIEW

Jack Dempsey and his firm Asset Management Partnership (AMP) led the business case analysis and development of the Jacobs' Program Management Office (PMO) contract that coordinated integration of state-level Army National Guard (ARNG) master plans for each state, three territories, and the District of Columbia (54 in total) in response to a Senate Armed Services Committee (SASC) inquiry.

The SASC inquiry sought to improve the readiness of ARNG 70 million square feet Readiness Center portfolio in support of US Code Title 10 (Armed Forces) and Title 32 (National Guard) requirements in the context of Gulf War draw-downs over a decade of gross underfunding Readiness Center MILCON and Facilities Sustainment, Restoration and Modernization (SRM) requirements.

Jack architected and deployed the Operational–Mission Dependency Index (O-MDI) and multi-criteria analysis that prioritized over 2,000 MILCON projects and supporting SRM programming for a 15-year / \$26B national investment strategy. He used this methodology to guide development of the National Guard Bureau business case that defined and justified Army-level POM analysis and budget justification. He also led development of planning products and the authoring of the resulting Readiness Center Transformation Master Plan (RCTMP) that was signed by a Deputy Secretary of the Army and submitted to SASC.



### KEY ELEMENTS

CONTRACT DATES: 2011 - 2015

CONTRACT VALUE: \$ 40 million

OWNER: US Army National Guard Bureau (NGB), Washington DC

CONTACT: Richard Krewson, NGB, richard.k.krewson.civ@army.mil, 703.254.6412

### WORK SCOPE

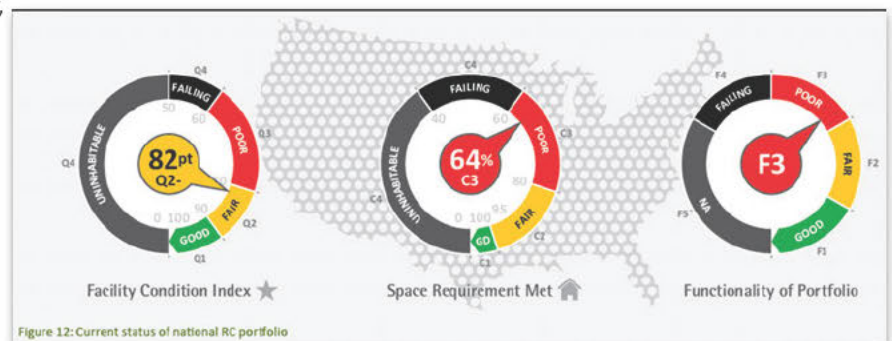
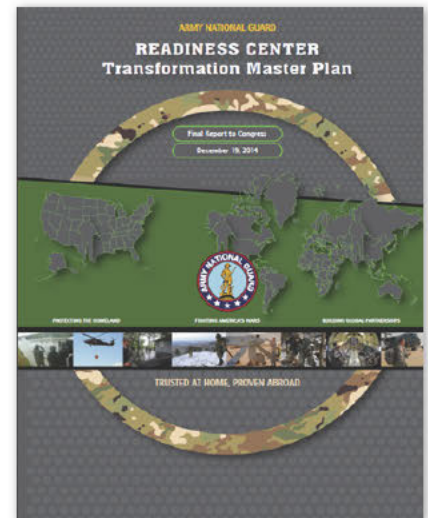
The RCTMP involved integration of 54 master plans for each state, three territory, and the District of Columbia. Jacobs led development of 18 of these master plans that involved development of planning factors, multiple planning charrettes, development of multiple courses of action, and final development of the selected COA in a The Adjutant General (TAG)-approved master plan. Work then included compilation of these 54 master plans into a single, nationwide business case analysis. This involved development methodology, risk-informed performance forecasting algorithms, development and deployment of the O-MDI, development of investment COAs that integrated MILCON and SRM programs, selection of the preferred COA, and authoring the final RCTMP that summarized all the above.

Jack and his firm's role was the lead development and solution architect for the business case analysis, forecasting algorithms, O-MDI. He was also principal author for the report. This included development of the report's narrative, tone, organization, authoring substantial portions of the report, and presentation of the business case and final recommendation.

This work in complete form covers the full WAARNG scope to develop and finalize its RCTMP, in that it used a comprehensive analysis of ARNG performance factors to include criteria detailed in NG PAM 415-12 – Army National Guard Facility Allowances, and specifically 1) facility size and configuration, 2) facility condition and capability, 3) facility functionality, 4) location and demographics (e.g. recruitment and retention), 5) family readiness, 6) shared use and partnerships, and 7) Operational Readiness.

### RESULTS

The result was a 15-year / \$26B Readiness Center Transformation Master Plan submitted to the Senate Armed Services Committee in 2014 that established budget justification for ARNG MILCON and SRM projects.



## 5 | Army Facility Investment Analysis US Army DCS G9 - Installations / USACE ERDC CERL

### OVERVIEW

Jack Dempsey and his firm Asset Management Partnership (AMP) developed next generation SRM prioritization capabilities for the Army-wide Facility Investment Plan Development.

This provided compiled Army SMS/BUILDER, ISR, RPLANS, ASIP, HQIIS, GFEBs data to support the Army’s national wide approximately \$8B SRM program management. This included development of project scoring and workflow analysis to support project scoring and competition of limited funding.



### KEY ELEMENTS

CONTRACT DATES: Jul 2021- Jul 2022

CONTRACT VALUE: \$498,288

OWNER: US Army ERDC – Construction Engineering Research Laboratory, Champaign IL

CONTACT: Louis “Buddy” Bartels, PhD, PE, Research Civil Engineer, louis.bartels@erdc.dren.mil, 217-373-4542

### WORK SCOPE

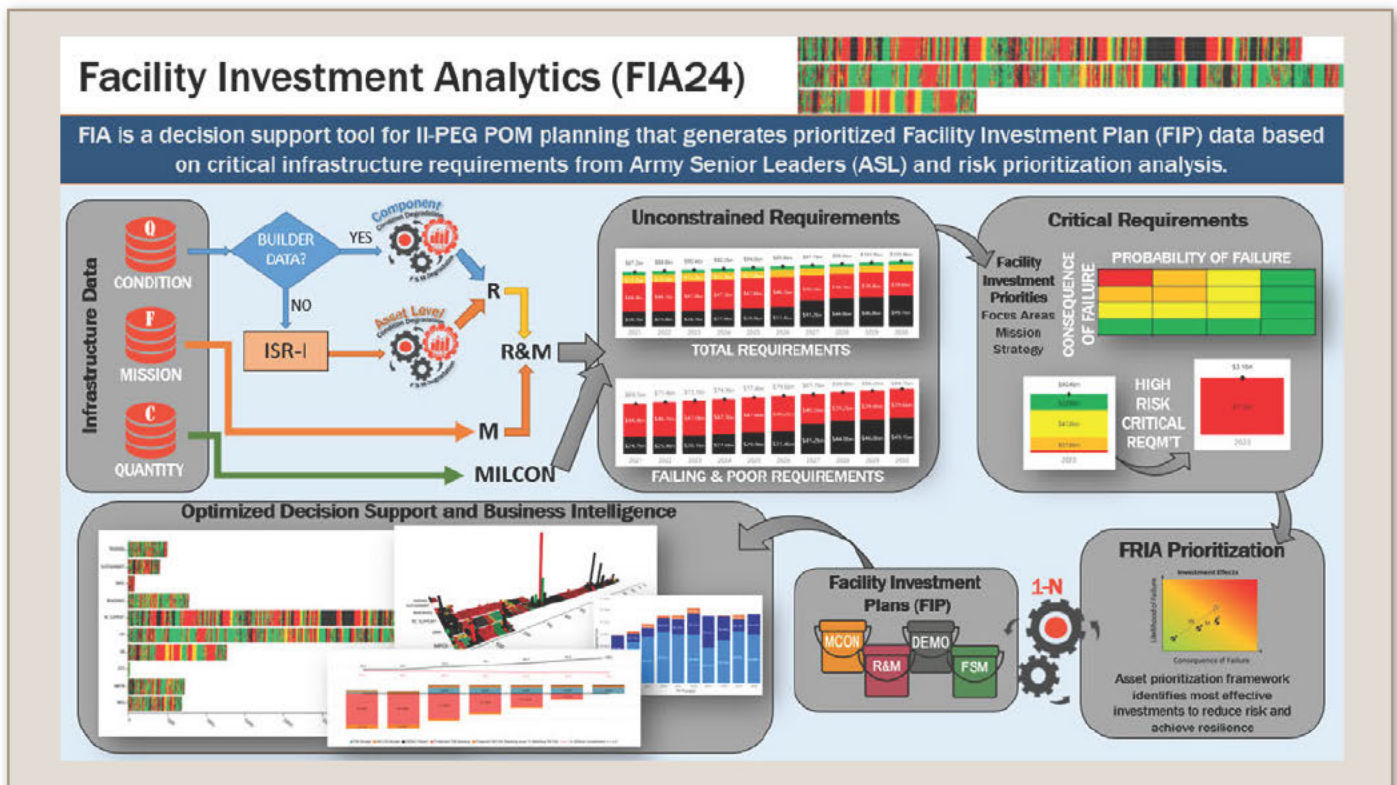
Work involved development of workflow processes to gather and compile data from ISR, SMS/BUILDER, and RPLANS to identify and development SRM project lists, and associate scoring criteria to include use of the Mission Dependency Index (MDI) to inform risk-based project prioritization.

This involved development of data screening, quality analysis, facilitated prioritization, and analysis using the Army’s develop Facility Investment Plan War Game (FIPWA).

Jack led development of the methodology and technology enablement.

### RESULTS

The product is currently used to prioritize major projects in the Army’s \$8B SRM program.





## 6 | USCG Asset Management Support Services U.S. Coast Guard (USCG)

### OVERVIEW

This project developed and implemented a comprehensive mission-support business model, asset management system, and real property program to manage the Coast Guard's shore infrastructure portfolio. This portfolio contains more than 40,000 facilities, structures, and aids to navigation, which are collectively valued at over \$20 billion.



### KEY ELEMENTS

**CONTRACT DATES:** Sep 2014 – Mar 2023  
**CONTRACT VALUE:** \$11 million  
**OWNER:** U.S. Coast Guard  
**CONTACT:** Fred Sommer, Deputy Director  
 SILC Engineering Services Division, USCG,  
 frederick.j.sommer@uscg.mil

### WORK SCOPE

Mary developed change management products to drive implementation of the Coast Guard's new Shore Infrastructure Mission Support Business Model. These products included a graphical representation of the model, Microsoft Word templates for Shore Infrastructure Logistics Center (SILC) technical orders, info-graphics explaining the SILC's structure and responsibilities, and an inaugural SILC Annual Report. These products are still being used every day at the SILC.

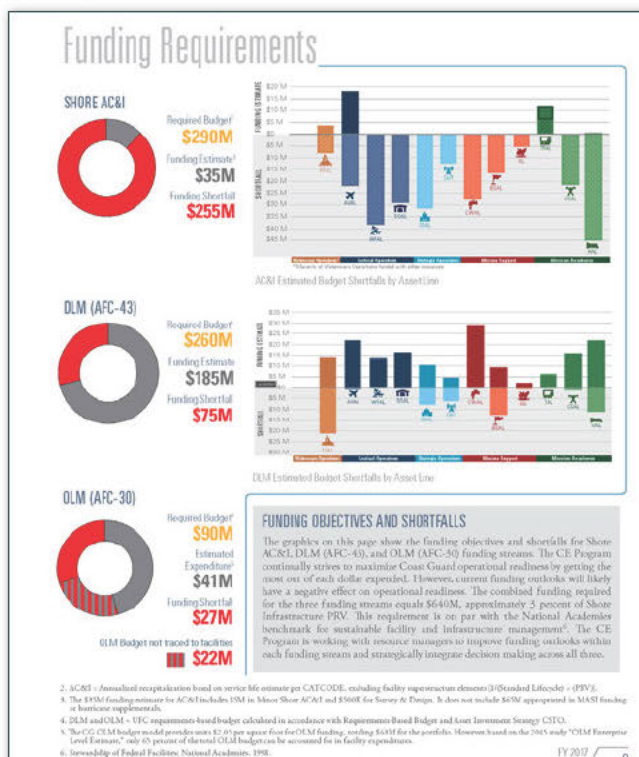
Mary worked with stakeholders at Coast Guard headquarters to rewrite their Real Property Management Manual. This manual establishes the Coast Guard's policy in compliance with multiple federal and DHS mandates for real property and required considerable coordination with stakeholders at all levels of the organization to ensure this compliance fit within established real property management procedures.

Mary also worked with stakeholders at the SILC Real Property Branch to write Process Guide Technical Orders to instruct personnel in how to acquire, manage, and dispose of Coast Guard real property.

### RESULTS

The most significant product Mary developed for the Coast Guard is the SILC Annual Report. Using clear language and engaging graphics, this report highlighted the fact that the Coast Guard Civil Engineering program was underfunded by \$357M annually for acquisitions, construction, improvement, and maintenance. This continued underfunding meant that required maintenance and recapitalization were not being performed on facilities and infrastructure as needed. This increased the demand to perform corrective maintenance, which is less cost effective than preventative maintenance, resulting in less effective use of resources, diminishment of shore infrastructure capabilities, and degradation of operational readiness.

As a direct result of the clarity of this communication, the Coast Guard has seen increases in funding for their Civil Engineering Program by the hundreds of millions, along with funding to address the maintenance backlog that resulted from decades of underfunding.



### CLIENT KUDOS

“Mary (Blake, Jacobs Technical Communications) does a great job developing alternative presentation formats. One testament to the high quality of graphics produced by Jacobs is the 11 by 17 graphic showing the asset classes which is hanging on the walls of many Coast Guard staff offices.

— Fred Sommer, Deputy Director SILC

# 7 | PACTS II DHS OCRSO Real Property and Asset Management Support Services

## U.S. Department of Homeland Security (US DHS)

### OVERVIEW

Mary supports DHS's Portfolio Transformation Office (PTO) with implementation of DHS-wide workplace transformation efforts. These efforts actualize DHS strategic priorities including, facility improvements that meet basic needs, sustainable and resilient facilities, and Workspace of the Future requirements that support evolving workforce flexibilities.

PTO is the integrator for DHS transformation priorities, coordinating across business lines within the Office of the Chief Readiness Support Officer (OCRSO) and at the Departmental level. PTO focuses on a future of work state from a workplace perspective, while enabling DHS to continue addressing the facility transformation requirement backlog in a sustainable and resilient manner.



### KEY ELEMENTS

**CONTRACT DATES:** Oct 2022 – Sep 2023  
**CONTRACT VALUE:** \$249,600  
**OWNER:** U.S. Department of Homeland Security  
**CONTACT:** Aretha Swann, Acting Directory Real Property Office, US DHS  
 aretha.swann@dhs.hq.gov

### WORK SCOPE

Mary assists PTO with the planning and programming of the centralized funds for DHS facilities under three funding streams:

- Inflation Reduction Act
- DHS Facility Transformation Fund
- DHS Nonrecurring Expenses Fund

The Inflation Reduction Act (IRA) provides \$500 million, to remain available until September 30, 2028, for implementation of sustainability and environmental investments across the Department. DHS uses IRA funds to address a significant backlog of repair and recapitalization needs in a sustainable and environmental manner.

DHS uses the Facility Transformation Fund (FTF) for DHS facilities investments that align with Workplace of the Future guidance, incorporate sustainability and environmental infrastructure, and address the facility transformation backlog requirements. These funds provide flexibility to support Departmental priorities for Component requirements that are in addition to Component real property budgets such as co-location/consolidation, sustainability and environmental, Joint Mission Support Centers (JMSCs), and other requirements. JMSC facilities enable timely and regionally focused information sharing, operational coordination, and integrated regional planning.

The Consolidated Appropriations Act of Fiscal Year 2022, Section 538 authorizes the establishment of the DHS Nonrecurring Expenses Fund (NEF). DHS uses NEF funding for information technology (IT) modernization under the direction and oversight of the Department's Chief Information Officer (CIO) and facilities infrastructure improvements, under the direction and oversight of the Department's Chief Readiness Support Officer (CRSO).

### RESULTS

Mary has produced multiple deliverables including strategic plans, communications plans, informative one-pagers, and templates.

Her contributions aid PTO in its goal to allocate funding to meet the Department's most pressing needs for facility improvements.

**Portfolio Transformation Office FACILITIES TRANSFORMATION FUND**

**Overview**  
Beginning Fiscal Year 2024, the DHS Facility Transformation Fund (FTF) will provide investments in our primary infrastructure and optimize the DHS portfolio, align with the Secretary's priorities, and deliver the strategic objectives outlined by the Deputy Secretary in the DHS Future of Work Strategic Framework. The FTF is a Procurement, Construction, and Investment (PCI) account that will provide upfront investments needed to deliver affordable modern, mitigate mission readiness vulnerabilities, and optimize the value realized from DHS assets. The FTF is a strategic tool leveraged by DHS leadership to reduce the Facility Transformation Requirements Backlog, to provide increased flexibility to support Departmental priorities, address portfolio lifecycle costs savings, and increase long-term sustainability.

FTF may be used for the following types of projects:  
 • Consolidation and Co-location  
 • DHS-Owned Facility Renovation  
 • Facility Resilience and Climate Adaptation

**Projects**  
Consolidation and Co-location projects are upfront investments in facility effectiveness to deliver more effective and efficient workplaces. To qualify, these projects must meet the DHS Workplace Readiness Requirements (see DHS Instruction 13-02-002), including utilization on rate targets, space sharing, and incorporate sustainability principles (e.g., Leadership in Energy and Environmental Design (LEED), energy/water efficiency, etc.).

Consolidation and co-location projects for DHS-owned facilities may include leasehold/tenant improvement funding if the location (including lease expiring or top termination rights) and new workspace will be built out.

Consolidation and co-location projects for DHS-owned facilities may include consolidating real property portfolios through the relocation of mission support capabilities followed by the disposal of a more costly and/or underperforming owned asset.

For portfolio, please contact: [202PortfolioTransformation@OHE.dhs.gov](mailto:202PortfolioTransformation@OHE.dhs.gov)

**DHS-Owned Backlog Reduction** projects are upfront investments to recognize mission-essential DHS-owned assets. To qualify, these projects should:

- Directly impact an existing asset in poor condition (i.e., Facility Condition Index (FCI) below 60 per DHS Instruction 13-02-004)
- Recovery Investment and/or Mission Essential Asset (see the DHS Business Impact Analysis process DHS Instruction 08-13-013)
- Incorporate sustainability principles (e.g., LEED, energy/water efficiency, etc.)

DHS-owned backlog reduction projects are prioritized based on the following criteria:  
 • Current FCI value relative to the 90FCI DHS standard target  
 • Number of years since last Facility Condition Assessment Survey was performed  
 • Most recent "tenant" Satisfaction Score value relative to the Government-wide average  
 • Additional consideration will be provided if asset is an Energy Independence and Security Act (EISA) Covered Facility

**Facility Resilience and Climate Adaptation** projects preserve critical mission essential functions of asset (and/or facilities). This category includes projects that:

- Provide infrastructure to house monitoring and/or sensing of critical (and/or operational) data network systems
- Provide barriers, retrofits, or zoning areas to protect mobile assets and access routes
- Mitigate or mitigate flood risk
- Reduce facility vulnerability to climate impacts, such as extreme storms, rising sea levels, increased flooding, and ground-level heat waves
- Manage emergency commodities (e.g., per- and poly-fluorinated substances and regulate the lighting heat) against anticipated impacts of climate change

Facility resilience and climate adaptation projects are prioritized based on the following criteria:  
 • Support of critical mission activities and assets  
 • These are activities and assets so vital to the Department that their inoperability or destruction would have a debilitating impact on security  
 • Support of mission essential functions  
 • These are functions that enable and/or provide vital services, exercise civil authority, maintain the safety of the public and sustain the national economy, some during disruption of normal operations  
 • Provide benefits to disadvantaged communities and communities of color

U.S. Mission Support Guidance for Fiscal Years 2023 - 2025, February 16, 2023  
 DHS Readiness Framework, August 17, 2018  
 DHS Climate Action Plan, October 7, 2021



## 8 | China Lake Earthquake Recovery Program

### U.S. Navy - Naval Air Weapons Station China Lake (NAWSCL)

#### OVERVIEW

This project developed DD1391 programming documents to consolidate missions and functions from 50 facilities damaged by earthquakes at NAWS China Lake.

As a modification to the initial task order, we were further tasked to develop nine DB RFPs for projects along the South Flight line. The project produced A-E design (100% construction documents).



#### KEY ELEMENTS

CONTRACT DATES: Apr 2020- Apr 2022  
 CONTRACT VALUE: \$11.2 million  
 OWNER: U.S. Navy, NAWSCL  
 CONTACT: Hai Dang, Program Manager, Jacobs, hai.dang@jacobs.com

#### WORK SCOPE

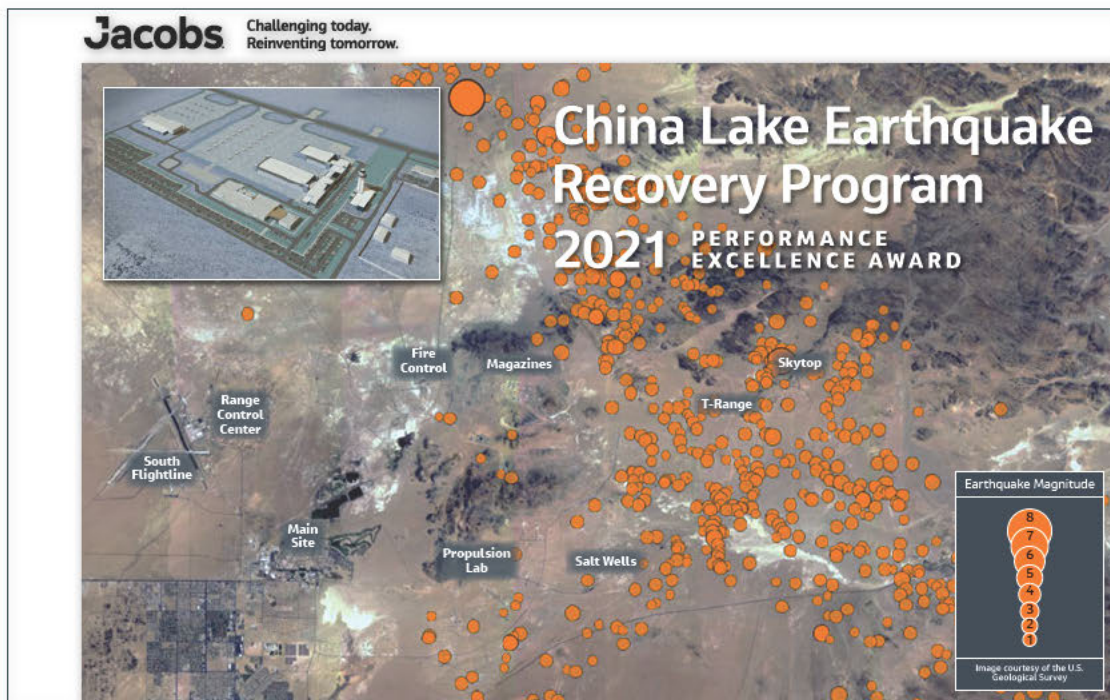
Mary developed the Facilities Engineering & Acquisition Division Reports for the initial task order. For the second task order, Mary developed presentations for the Architect-Engineer (AE) Designer to Officer in Charge of Construction (OICC) Reports.

Mary helped develop the Real-Time Corridor Comprehensive Planning Document, which defined the strategic planning and optimization of the China Lake facilities with the goal of a unified Range Architecture (RA) to meet future Range requirements in the areas of capability, capacity, safety and security. Mary assisted the team in establishing baseline conditions by completing the following tasks:

- Performed field verifications and surveyed the existing facility to generate a condition rating for each facility.
- Conducted a mission dependency index survey to validate the connection to the criticality of each facility to the mission.
- Facilitated a Basic Facilities Requirements (BFR) workshop to document functional requirements and the corresponding billet names to identify potential gaps in the move plans and space allocations.

#### RESULTS

The results of the Real-Time Corridor Comprehensive Planning Document was the efficient and effective transition of personnel throughout the process of demolishing and construction of replacement facilities.



# Tab v

## **Cost Proposal**



## V COST PROPOSAL

The cost estimate below reflects the Halcyon Northwest Team's best estimation of the deliverables, travel, materials, and other associated costs for the project. The proposal includes some assumptions such as the duration of meetings. We included optional on-site visits as part of the quote.

The Halcyon Team will work with the Washington Military Department to refine these estimates when the scope of work is completed.

	Labor Costs	Print Costs	Travel Costs	Meeting Refreshments	Total
<b>Project Management</b>					
Monthly Client Meeting	\$2,415.00				
Internal Team Coordination Meetings	\$22,106.00				
Charter	\$870.00				
<b>Subtotal</b>					<b>\$25,391.00</b>
<b>Discovery</b>					
Kickoff, Visioning & Mission discussion	\$5,628.00				
Discovery Meeting #1: In Person	\$8,778.00		\$2,091.90	\$150.00	
Stakeholder Register & RACI Matrix	\$870.00				
Detailed Workplan with Graphic	\$1,630.00				
Project Schedule	\$700.00				
Risk Register	\$807.00				
Visioning & Mission Process	\$1,234.00				
Discovery meeting #2: Virtual (Includes annotated outline)	\$1,946.00				
<b>Subtotal</b>					<b>\$23,834.90</b>
<b>Development</b>					
Executive Leader Interviews	\$2,232.00				
General survey - development & distribution	\$700.00				
General survey analysis	\$1,550.00				
Initial draft of RPDP (35% complete)	\$5,076.00				
Region-specific surveys - development & distribution	\$1,575.00				
Virtual Regional Meetings	\$13,218.00				
Meeting Inception Reports	\$3,282.00				
Data analysis for Region-specific surveys	\$3,600.00				
Business Case Work Session	\$1,838.00				
Draft Executive Briefing/Presentation	\$3,598.00				
<b>Subtotal</b>					<b>\$36,669.00</b>
<b>Finalizing</b>					
Final Draft of RPDP (95% complete)	\$27,870.00				
Final Executive Briefing/Presentation	\$8,778.00		\$1,491.90	\$150.00	
Proofreading & Editing	\$1,300.00				
Final RPDP	\$2,362.00				
12 Hard Copies (100 pages, color)			\$3,000.00		
<b>Subtotal</b>					<b>\$44,951.90</b>
<b>Total</b>	<b>\$123,963.00</b>	<b>\$3,000.00</b>	<b>\$3,583.79</b>	<b>\$300.00</b>	<b>\$130,846.79</b>
<b>Optional: On-site visits</b>					
On-site visit #1 - Seattle	\$10,566.00		\$1,564.87	\$150.00	
On-site visit #2 - Spokane area	\$8,202.00		\$986.00	\$150.00	
On-site visit #3 - Central Washington	\$8,202.00		\$648.00	\$150.00	
On-site visit #4 - Bellingham/Port Angeles	\$8,202.00		\$444.00	\$150.00	
<b>Subtotal</b>					<b>\$39,414.87</b>
<b>Total with Optional On-site Visits</b>					<b>\$170,261.66</b>



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