



EXHIBIT A: PROPOSAL COVER SHEET

All fields must be completed where applicable. **Failure to complete this form will result in the proposal being rejected as non-responsive.**

Business Name: Evergreen Workforce Consulting		
Type of Business <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (State of Incorporation ___) <input checked="" type="checkbox"/> LLC		
Physical Business Address (Must NOT be a PO Box) 205 E Illinois St		
City Bellingham	State WA	Zip Code 98225
Business Telephone # (360) 630-6474	Business Fax # N/A	Business Email emily@evergreenworkforceconsulting.com
WA State UBI ¹ # 605 319 050	Federal EIN# 93-3124937	

Receipt is hereby acknowledged of Addenda No(s): 1 ___ ___ ___

NOTE: Failure to acknowledge receipt of addenda will be considered non-responsive to the proposal

OFFICAL AUTHORIZED TO SIGN FOR PROPOSER

"I declare under penalty of perjury under the laws of the State of Washington that these qualifications are genuine. This proposal is not false or made on behalf of any person who has an interest in the award. No other proposer has been solicited to put a false proposal, adjust their price lists, or coerced any other company to refrain from proposing. I guarantee that my firm has not attempted to secure an advantage over any other Proposer through collusion. All statements and information contained in the submitted proposal are true, correct, and based on the requested scope of Work. All employees and agents of the Proposal are skilled and experienced in the required Work. In the event that the Project or any aspect of the project is found to be non-compliant, I understand my company will be held responsible to remedy all deficiencies at no additional cost. I understand that my firm will be required to perform under the terms and conditions outlined in the solicitation and proposal, if accepted. I acknowledge that WTA may not negotiate additional terms to the potential contract once the Notice of Intent to Award is issued and that we may be held to the contract and performance terms and conditions outlined in the RFP. My signature below assures WTA that the firm acknowledges and will comply with this solicitation."

<u>Signature of Authorized Officer/Agent</u> 	<u>Date</u> 11/21/2023
<u>Print Name & Title</u> Emily Boehm, Founder & CEO	<i>The individual named herein is duly authorized to obligate the firm to a contract.</i>

Note: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.

¹ Bellingham Municipal Code 6.05.025

² RCW Chapter 18.27



EXHIBIT B: PROPOSER INFORMATION

Provide ALL of the requested information about your organization. ***Failure to provide ALL requested information will result in rejection of the submission as non-responsive.***

PRIMARY CONTACT • Name • Title • Phone • Email	Emily Boehm Founder & CEO (360) 630-6474 emily@evergreenworkforceconsulting.com
EMPLOYMENT SECURITY DEPARTMENT #	N/A
YEARS IN INDUSTRY	20 years
ANNUAL REVENUES*	<input checked="" type="checkbox"/> Less than \$500,000 <input type="checkbox"/> \$500,000-\$1 million <input type="checkbox"/> \$1 – 2 million <input type="checkbox"/> \$2 – 5 million <input type="checkbox"/> \$5 – 10 million <input type="checkbox"/> More than \$10 million
MBE/DBE <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No DBE Registration# _____	SBA <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No SBA Registration# _____
STAFF SIZE List staff numbers & positions who will be assigned to this contract	1 – Founder & CEO
CUSTOMER LIST (3-5 additional customers besides references below)	Unity Care NW Brigid Collins Family Support Center
NAIC NUMBERS (naics.org for more info)	541612 – Human Resources Consulting

** WTA reserves the right to request financial statements from proposers to demonstrate financial responsibility. Failure to provide requested documentation will result in the proposal being rejected as non-responsive and not responsible*



EXHIBIT C: PRICE PROPOSAL

Rates should not include sales tax, although WTA is not tax exempt for the work. ONLY USE THIS EXHIBIT. Refer to RFP 4.C for detailed evaluation criteria.

To equally evaluate pricing across proposers, WTA will calculate a lump sum “cost” for the following classifications (or closest matching classification) and hours under a hypothetical project for each Category. Complete one (1) separate Exhibit C: Price Proposal for EACH category. Scores will be assigned to the lump sum cost. If the Job classification does not apply, enter “0” or “N/A”. Refer to RFP Part 4 for Cost evaluation procedures.

CATEGORY PROPOSING:

- Category 1 General Services
- Category 2 Employee Recruitment Process
- Category 3 Training & Organizational Development
- Category 4 Employee & Labor Relations Programs

Job Classification	Respondent Equivalent	Hourly Rate	Hour	Extended Price
Principal in-Charge	Founder & CEO	\$125.00	3	\$375.00
Project Manager		\$0	25	N/A
Project Coordinator/Admin.		\$0	15	N/A
		LUMP SUM COST		\$

The below template must be used if there are other Job Classifications that will be assigned to the forthcoming contract, but not considered in the evaluation table above. Proposers MAY add/delete rows and use additional sheets if necessary provided the format remains the same. Labor rates for project principals, administrative staff, materials, overhead, General & Administrative (G&A), and any other reimbursable fees must be detailed.

Refer to the RFP Part 5.B for Travel Reimbursement. These rates will be used to price future projects.

The below rates will be in effect for the first twelve (12) months of the contract. Refer to RFP 5.G Economic Price Adjustments.

Job Classification	Hourly Rate
N/A	\$0

Material & other direct cost Mark Up _____%

Sub-Consultant Mark Up _____%

Any sales tax is billed at 8.8%

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Job Classification	Hourly Rate
N/A	\$0

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Job Classification	Hourly Rate
N/A	\$0

Material & other direct cost Mark Up _____%

Sub-Consultant Mark Up _____%

Any sales tax is billed at 8.8%

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EXHIBIT D: CONFLICT OF INTEREST STATEMENT

The undersigned declares under penalty of perjury under the laws of the state of Washington that the foregoing is true and correct to the best of their knowledge and belief.

1. Conflict of Interest

The Proposer, by entering submitting these qualifications to Whatcom Transportation Authority (WTA) to perform or provide work, services or guarantees, ensures that it has no direct or indirect financial or proprietary interest in the forthcoming award of contract as outlined in the request Documents. Proposer shall not acquire any such interest, which conflicts in any manner or degree with the services required to be performed under a Contract. Proposer shall not employ any person or agent having such interest on any WTA specific work. In the event that the Proposer or its agents, employees or representatives finds such a conflict of interest, it shall immediately disclose such interest to WTA and take action immediately to eliminate the conflict or to withdraw from this contract, as WTA may require. Should WTA discover a disclosable conflict post award, it will be grounds for immediate contract termination under the terms of the contract.

2. Contingent Fees and Gratuities

The awarded Proposer, by entering into a contract with WTA to perform or provide services or materials for WTA has thereby guaranteed, and by this affidavit does again promise and assure:

That no person or selling company except bona fide employees or designated agents or representatives of the Proposer has been employed or retained to solicit or secure this contract with an agreement or understanding that a commission, percentage, brokerage, or contingent fee would be paid; and

That no gratuities, in the form of entertainment, gifts or otherwise, were offered or given by the Proposer or any of its agents, employees or representatives, to any official, member or employee of WTA or other governmental agency with a view toward securing this contract or securing favorable treatment with respect to the awarding or amending, or the making of any determination with respect to the performance of this contract.

Date: 11/21/2023 Signature: 

Printed Name: Emily Boehm

Title: Founder & CEO

Note: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.



EXHIBIT E: DEBARMENT AND COMPLIANCE STATEMENT

By submitting a signed proposal, each Proposer is assuring WTA of the following:

1. The Proposer is not on the current list of Washington State debarment lists.
2. The Proposer is registered with SAM.gov and is not restricted or prohibited from proposing or doing business with a government agency.
3. The Proposer agrees to adhere to ADA requirements.
4. The Proposer will work to promote employment and opportunity among Disadvantaged Business Enterprises (DBE) as well as small and women/minority owned businesses. The Proposer, sub-recipient, or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The Proposer shall carry out applicable requirements of 49 CFR part 26 in the award and administration of DOT assisted contracts. Failure by the Proposer to carry out these requirements is a material breach of any contract, which may result in the termination of any contract or such other remedy as the recipient deems appropriate
5. The Proposer certifies that he/she/it does not maintain or provide for his/her/its employees any segregated facilities at any of its establishments, and that it does not permit its employees to perform their services at any location, under its control, where segregated facilities are maintained.
6. That the Proposer assures that the he/she/it is fully licensed, bonded, and insured. A copy of the successful Proposer’s certificate of insurance and a W9 will be required prior to the issuance of a Notice to Proceed or a Purchase order. Business licenses and/or professional certifications will be used to establish Proposer responsibility as part of the evaluation process.

Date: 11/21/2023 Signature: 

Printed Name: Emily Boehm

Title: Founder & CEO

Note: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.



EXHIBIT F: PROPOSAL RESPONSE

Proposers shall use this Exhibit to provide the information requested. Proposers may emphasize in their narrative any areas of their proposal that they believe exceed our requirements. Proposers are advised to clearly communicate enough detail and relevant information to ensure effective evaluation by WTA’s Evaluation Committee. Firms will indicate which category from the Scope of Work they are proposing. Complete one (1) separate Exhibit F: Proposal Response for EACH category. See RFP Part 4 for Evaluation Procedures.

CATEGORY PROPOSING:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Category 1 General Services | <input type="checkbox"/> Category 3 Training & Organizational Development |
| <input type="checkbox"/> Category 2 Employee Recruitment Process | <input type="checkbox"/> Category 4 Employee & Labor Relations Programs |

1. Qualifications and Relevant Experience

Company Information

Emily Boehm, SHRM-SCP, brings over twenty years of expertise to modern human resources, having cultivated engaging workplaces across diverse industries such as government, healthcare, non-profit, aerospace, manufacturing, and design. After over 12 years as the Human Resources Director at Unity Care NW, a mission-based organization with 300 employees in Bellingham, Washington, she recently founded Evergreen Workforce Consulting to be a broader resource to the local Whatcom County community. Emily is the sole consultant with Evergreen Workforce Consulting.

Qualifications, Experience, Achievements

Over her career, Emily has been the HR department of one up to leading an HR team of ten. Her most recent experience was supporting an organization grow from 125 to 300 employees and navigating the cultural and systematic changes needed to support the changing workforce.

HR function experience includes:

- personnel policy development & implementation,
- personnel recordkeeping systems,
- organizational design, job descriptions, & classification,
- recruiting & onboarding,
- total rewards, including compensation & benefits,
- human resources information systems (HRIS) selection & implementation,
- employee engagement assessment and action planning,
- learning and development program design and facilitation,



- employee communications,
- performance management systems,
- diversity, equity, and inclusion,
- compliance,
- leave programs,
- and investigations & employee relations.

Her philosophy is rooted in the belief that people are the driving force behind organizational success. She is committed to partnering with businesses to cultivate environments where individuals thrive, contribute their best, and align with the company's strategic objectives. Her approach combines a deep understanding of human dynamics with strategic HR practices, ensuring that organizations not only navigate challenges effectively but also foster cultures of trust, so employees want to give their best. She believes in tailor-made solutions that recognize the uniqueness of each workplace, placing people at the heart of every organizational strategy for sustained success. All work would be performed in accordance with WTA practices, regulations, policies, procedures, and standards, as appropriate, and all applicable state and federal law.

Resume

Emily Boehm's resume - see below (applies to all categories)

Turnover Rate

0% - Emily is the sole consultant with Evergreen Workforce Consulting.

2. Technical Capability, Approach, and Capacity

Emily's approach to planning and executing the general services is collaborative and would be co-created with WTA based on their needs. All general services would be provided by her and not subcontracted out. Emily is located in Bellingham, Washington making in-person services easily accessible and available without additional travel costs to WTA in Whatcom County.

For an overall assessment of WTA's HR function, one approach would be to conduct a Human Resources Audit to assess strengths and opportunities, and then map out next steps for a best-in-class function. This would include a determination of audit scope, review of existing documents and information, interviews with HR staff, evaluation against best practices, and a report of findings and recommendations. Emily would collaborate with leadership throughout this process. HR Audits typically take 10-12 hours depending on the scope & volume of documents.

Specific assessments can be performed as needed by WTA on policies, personnel files/recordkeeping, job descriptions/classifications, recruiting, recognition, engagement, culture, and more.



Additionally, Emily can provide broad expertise in the field of Human Resources for specific technical assistance as needed by WTA.

3. Communication, Customer Services, and Training

Communication

Emily is a collaborative partner with her clients. Communication can be tailored to the needs of WTA and the specific active project. Regular communication is mutually essential for WTA to be able to monitor the progress of a project & for Emily to be able to receive input and direction to provide tailored solutions. Routine progress reports can be provided in-person, virtually (e.g. zoom), or through email at WTA's preferred frequency. As a local Whatcom County resource, in-person meetings can be easily scheduled with Emily.

Customer Satisfaction

Emily derives immense satisfaction from fostering customer relationships. She employs the four C's of trust—commitment, caring, consistency, and competence—cultivating and nurturing enduring connections with her customers.

Professional Development / Training

In the ever-evolving landscape of HR, Emily remains at the forefront by staying current with dynamic practices and continually expanding her knowledge through diverse methods. As a dedicated HR professional, she actively engages with the Society of Human Resources Management (SHRM), participating in both the national organization and the local chapter in Bellingham. Emily is a committed learner, regularly attending SHRM training sessions to stay abreast of industry updates. She is on the Mt. Baker SHRM Board of Directors in 2024.

Beyond formal training, Emily is an avid reader, with favorites such as "Multipliers," "How to Be an Inclusive Leader," and "The Speed of Trust." Recognizing the value of a broad network, she actively stays connected with HR professionals, considering it a rich resource for continuous learning.

4. Performance, and Quality Assurance

Relevant Project Experiences

Unity Care NW (non-profit healthcare)

1616 Cornwall Ave, Ste 205

Bellingham, WA 98225

Shanon Hardie, Chief Operating Officer, shanon.hardie@ucnw.org, 360.788.2667

Danielle Crim, HR Director (former HR Manager), Danielle.crim@ucnw.org, 360.788.2622

Employed as HR Director 2011-2023

Responsible for all human resources programs, including recruitment and selection, policy development and administration, compensation and benefits, employee recognition,



organizational development, diversity, equity, and inclusion, leave management, employee engagement, safety, & employee relations.

Feedback

“Her experience, expertise, energy, and enthusiasm, create such an effective combination and result in innumerable contributions to our organization.” Unity Care NW

Average length of contract - N/A

Retired under WA State 2008 Early Retirement Factor (ERF)? No.

Contract default? N/A

Time extensions? N/A

Past or pending liens, claims, infractions, or citations for services? No.

Contract terminations for reasons other than the natural expiration? No.



EXHIBIT F: PROPOSAL RESPONSE

Proposers shall use this Exhibit to provide the information requested. Proposers may emphasize in their narrative any areas of their proposal that they believe exceed our requirements. Proposers are advised to clearly communicate enough detail and relevant information to ensure effective evaluation by WTA’s Evaluation Committee. Firms will indicate which category from the Scope of Work they are proposing. Complete one (1) separate Exhibit F: Proposal Response for EACH category. See RFP Part 4 for Evaluation Procedures.

CATEGORY PROPOSING:

- Category 1 General Services
- Category 2 Employee Recruitment Process
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1. Qualifications and Relevant Experience

Company Information

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Qualifications, Experience, Achievements

Over Emily’s career, she has designed sourcing and selecting processes/tools and directly led the recruitments for all levels of employees. This includes everything from park rangers, engineers, maintenance workers, healthcare workers, administrators, and C-suite leaders.

Emily believes the key to launching a successful recruitment is a clear employee value proposition (EVP) that is linked to an organization’s mission, creates an image that attracts people, and provides a clear view of the employee experience. The best matches can be made when both the employer and the employee have a clear understanding of each other. Recruiting the right people is a core employee engagement and retention strategy.

Recruiting practices also need to be in compliance and protect both the candidate and organization. Systemic elements such as the job application, structured interview questions, interview panels, and a job specific recruitment plan can support fair treatment.



Additionally, training for interviews and decision makers on “do’s and don’t” and implicit bias improve the quality and fairness of decisions.

Her philosophy is rooted in the belief that people are the driving force behind organizational success. She is committed to partnering with businesses to cultivate environments where individuals thrive, contribute their best, and align with the company's strategic objectives. Her approach combines a deep understanding of human dynamics with strategic HR practices, ensuring that organizations not only navigate challenges effectively but also foster cultures of trust, so employees want to give their best. She believes in tailor-made solutions that recognize the uniqueness of each workplace, placing people at the heart of every organizational strategy for sustained success. All work would be performed in accordance with WTA practices, regulations, polices, procedures, and standards, as appropriate, and all applicable state and federal law.

Resume

Emily Boehm’s resume - see below (applies to all categories)

Turnover Rate

0% - Emily is the sole consultant with Evergreen Workforce Consulting.

2. Technical Capability, Approach, and Capacity

Emily’s approach to planning and executing the general services is collaborative and would be co-created with WTA based on their needs. All services would be provided by her and not subcontracted out. Emily is located in Bellingham, Washington making in-person services easily accessible and available without additional travel costs to WTA locations in Whatcom County.

For an assessment of WTA’s current recruitment process and tools, one approach would be to conduct an audit to assess strengths and opportunities, and then map out next steps for a continuous improvement. This would include a determination of audit scope, review of existing documents and information, interviews with HR staff, evaluation against best practices, and a report of findings and recommendations for modernizing and streamlining. Emily would collaborate with leadership throughout this process. HR Audits typically take six hours depending on the scope & volume of documents.

Standard steps for a recruitment lead by Emily include the following. This process can be adapted to ensure work is performed in accordance with WTA practices, regulations, polices, procedures, and standards as well as any specific position needs.

1. Strategy Alignment

- a. Define position purpose, responsibilities, qualifications, requirements, and preferences.
- b. Identify project stakeholders and decision maker.



- c. Assess current employee value proposition, job description, compensation, & unique characteristics.
 - d. Establish recordkeeping system.
 - e. Create a search plan and screening tools.
2. Initial screen
 - a. Source candidates.
 - b. Screen candidate for minimum qualifications.
 - c. Evaluate candidates against criteria.
 - d. Select top candidates for further screening, typically 7-10.
3. Phone screen
 - a. Phone screen top candidates.
 - b. Evaluate candidates against criteria.
 - c. Select top candidates for further screening, typically 3-5.
4. Interview
 - a. Prepare and share candidate packets with interviewers.
 - b. Support and coordinate interviews, as needed.
5. Selection
 - a. Conduct reference checks.
 - b. Support final selection determination by decision maker.
 - c. Support negotiations for salary, benefits, relocation, and other package elements.
 - d. Communicate with candidates not selected.

Emily is a team player and can offer support to the WTA staff on any recruiting step as needed for their recruiting processes. This could include posting job advertisements, updating posting language, phone screening candidates, and consulting on offer negotiations. She is adept at sourcing and screening candidates, and conducting reference checks.

3. Communication, Customer Services, and Training

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Danielle Crim, HR Director (former HR Manager), Danielle.crim@ucnw.org, 360.788.2622

Employed as HR Director 2011-2023

Responsible for recruiting policies, standards, and procedures. Directed two recruiters and participated in all senior leadership recruitment plans/tools and interview panels, plus consulted on innumerable other recruitments. Directly led recruitments for HR Manager.

Feedback

"Her experience, expertise, energy, and enthusiasm, create such an effective combination and result in innumerable contributions to our organization." Unity Care NW

Average length of contract - N/A

Retired under WA State 2008 Early Retirement Factor (ERF)? No.

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Qualifications, Experience, Achievements

Over her career she has led the development and implementation of staff training programs. This includes partnering with leadership on needs assessments, establishing learning goals, developing content, and delivering trainings in remote and in-person settings. Emily has created and delivered foundational trainings such as discrimination and harassment prevention, emergency preparedness, and disruptive persons. For leaders, she has conducted trainings on performance management, emotional intelligence, recruitment, engagement, giving feedback, recognition, leave management, and more. For front-line staff, trainings include customer service, company values and culture, and personnel policies. She has also managed learning management systems and web-based trainings.

Long-term organizational considerations are one of Emily’s sweet spots. She has worked with organizations to lead employee engagement and values based cultural work that listen to voices from all staff to find pathways that support the organization’s mission.



Her philosophy is rooted in the belief that people are the driving force behind organizational success. She is committed to partnering with businesses to cultivate environments where individuals thrive, contribute their best, and align with the company's strategic objectives. Her approach combines a deep understanding of human dynamics with strategic HR practices, ensuring that organizations not only navigate challenges effectively but also foster cultures of trust, so employees want to give their best. She believes in tailor-made solutions that recognize the uniqueness of each workplace, placing people at the heart of every organizational strategy for sustained success. All work would be performed in accordance with WTA practices, regulations, policies, procedures, and standards, as appropriate, and all applicable state and federal law.

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0% - Emily is the sole consultant with Evergreen Workforce Consulting.

2. Technical Capability, Approach, and Capacity

Emily's approach to planning and executing the general services is collaborative and would be co-created with WTA based on their needs. All services would be provided by her and not subcontracted out. Emily is located in Bellingham, Washington making in-person services easily accessible and available without additional travel costs to WTA locations in Whatcom County.

Learning & Development

For an assessment of WTA's current education & training opportunities, one approach would be to conduct a training assessment to determine gaps between strategic priorities and the current state, and then map out next steps for a learning plan. This would include a determination of scope, review of existing documents and information, interviews and/or surveys with staff, evaluation against strategic priorities and best practices, and a report of findings and recommendations for a learning plan. Emily would collaborate with leadership throughout this process. Training assessments typically take six hours depending on the scope, volume of documents, and interviews.

Emily can develop and deliver trainings in accordance with WTA's needs. These may be provided in person, remotely (e.g. Zoom, MS Teams), or recorded for online distribution. Typically two hours of preparation support one hour of content delivery.

Additionally, Emily can develop learning paths that could include reading, podcasts, videos, or other media/learning resources allowing more independent learning opportunities that balance operational needs.



Another opportunity for consideration would be mentoring and coaching programs, leveraging the talent existing within WTA.

Organizational Development

Emily would collaboratively work with WTA and HR leadership to determine opportunities for improving the long-term success of the organization through its people, their development, and the overall health of the workplace culture. Solutions could include:

- Leadership development – developing learning plans & developing/delivering training.
- Communication improvement – improving the transparency and accessibility of information through employee communications.
- Employee engagement – survey administration and multi-level action planning (organization, team, and individual).
- Cultural assessment and development – creating/revising specific behavioral expectations in alignment with WTA values & systemically building them into WTA's practices (e.g. recruiting, performance management).
- Team building – tools, trainings, and workshops to improve team connectedness.
- Succession planning – identifying key positions, assessing current talent, and designing development opportunities.

3. Communication, Customer Services, and Training

Communication

Emily is a collaborative partner with her clients. Communication can be tailored to the needs of WTA and the specific active project. Regular communication is mutually essential for WTA to be able to monitor the progress of a project & for Emily to be able to receive input and direction to provide tailored solutions. Routine progress reports can be provided in-person, virtually (e.g. zoom), or through email at WTA's preferred frequency. As a local Whatcom County resource, in-person meetings can be easily scheduled with Emily.

Customer Satisfaction

Emily derives immense satisfaction from fostering customer relationships. She employs the four C's of trust—commitment, caring, consistency, and competence—cultivating and nurturing enduring connections with her customers.

Professional Development / Training

In the ever-evolving landscape of HR, Emily remains at the forefront by staying current with dynamic practices and continually expanding her knowledge through diverse methods. As a dedicated HR professional, she actively engages with the Society of Human Resources Management (SHRM), participating in both the national organization and the local chapter in Bellingham. Emily is a committed learner, regularly attending SHRM training sessions to stay abreast of industry updates. She is on the Mt. Baker SHRM Board of Directors in 2024.



Beyond formal training, Emily is an avid reader, with favorites such as "Multipliers," "How to Be an Inclusive Leader," and "The Speed of Trust." Recognizing the value of a broad network, she actively stays connected with HR professionals, considering it a rich resource for continuous learning.

4. Performance, and Quality Assurance

Relevant Project Experiences

Unity Care NW (non-profit healthcare)

1616 Cornwall Ave, Ste 205

Bellingham, WA 98225

Shanon Hardie, Chief Operating Officer, shanon.hardie@ucnw.org, 360.788.2667

Danielle Crim, HR Director (former HR Manager), Danielle.crim@ucnw.org, 360.788.2622

Ron Marks, Organizational Development Specialist, ron.marks@ucnw.org, 970.581.3666

Employed as HR Director 2011-2023

Responsible for training and organizational development policies, standards, and procedures. Actively engaged in OD and training facilitation as well as directed an Organizational Development Specialist.

Specific projects included:

- Led annual employee engagement survey & action planning
- Led collaborative process to establish & integrate aspirational and expected behaviors in alignment with organizational values
- Conducted annual training needs assessment & developed organizational learning plans
- Developed and facilitated live trainings

Feedback

"Her experience, expertise, energy, and enthusiasm, create such an effective combination and result in innumerable contributions to our organization." Unity Care NW

Average length of contract - N/A

Retired under WA State 2008 Early Retirement Factor (ERF)? No.

Contract default? N/A

Time extensions? N/A

Past or pending liens, claims, infractions, or citations for services? No.

Contract terminations for reasons other than the natural expiration? No.



EXHIBIT F: PROPOSAL RESPONSE

Proposers shall use this Exhibit to provide the information requested. Proposers may emphasize in their narrative any areas of their proposal that they believe exceed our requirements. Proposers are advised to clearly communicate enough detail and relevant information to ensure effective evaluation by WTA’s Evaluation Committee. Firms will indicate which category from the Scope of Work they are proposing. Complete one (1) separate Exhibit F: Proposal Response for EACH category. See RFP Part 4 for Evaluation Procedures.

CATEGORY PROPOSING:

- Category 1 General Services
- Category 2 Employee Recruitment Process
- Category 3 Training & Organizational Development
- Category 4 Employee & Labor Relations Programs

1. Qualifications and Relevant Experience

Company Information

Emily Boehm, SHRM-SCP, brings over twenty years of expertise to modern human resources, having cultivated engaging workplaces across diverse industries such as government, healthcare, non-profit, aerospace, manufacturing, and design. After over 12 years as the Human Resources Director at Unity Care NW, a mission-based organization with 300 employees in Bellingham, Washington, she recently founded Evergreen Workforce Consulting to be a broader resource to the local Whatcom County community. Emily is the sole consultant with Evergreen Workforce Consulting.

Qualifications, Experience, Achievements

Employee relations are a fundamental human resources department responsibility. Emily takes this role very seriously as a core element of a fair workplace. She has provided employee relations support to front-line employees and leaders and worked collaboratively with legal counsel. This has included interpersonal conflict one-on-one and at a team level. She has conducted investigations into discrimination and harassment, including microaggressions, wage and hour, workplace violence, drug use, theft, and other policy concerns. Her methods are adaptable to small-scale investigations with one or two parties, as well as broad investigations with multiple interviews and complex allegations. She has extensive experience that includes the development, implementation, and practice of employee performance reviews, onboarding, promotions, terminations, and exit interviews through her 20 years of human resources experience.

Her union experience was gained while working at the Washington State Parks and Recreation Commission. She was the sole HR contact for the NW region supporting all state parks staff located between the coast and the Cascades, north of Seattle. During her time



there she supported the organization and staff by administering HR practices within the collective bargaining agreement.

Her philosophy is rooted in the belief that people are the driving force behind organizational success. She is committed to partnering with businesses to cultivate environments where individuals thrive, contribute their best, and align with the company's strategic objectives. Her approach combines a deep understanding of human dynamics with strategic HR practices, ensuring that organizations not only navigate challenges effectively but also foster cultures of trust so employees want to give their best. She believes in tailor-made solutions that recognize the uniqueness of each workplace, placing people at the heart of every organizational strategy for sustained success.

Resume

Emily Boehm's resume - see below (applies to all categories)

Turnover Rate

0% - Emily is the sole consultant with Evergreen Workforce Consulting

2. Technical Capability, Approach, and Capacity

Emily's approach to planning and executing the general services is collaborative and would be co-created with WTA based on their needs. All services would be provided by her and not subcontracted out. Emily is located in Bellingham, Washington making in-person services easily accessible and available without additional travel costs to WTA locations in Whatcom County.

Emily's standard steps for a full investigation include the following. These steps can be adapted to ensure work is performed in accordance with WTA practices, regulations, policies, procedures, and standards and union collective bargaining agreements.

1. Define the allegations.
2. Plan the investigation, including timeline and deadlines.
3. Notify relevant parties, including the complainant, alleged offender, and witnesses including directives regarding confidentiality.
4. Conduct interviews.
5. Gather evidence.
6. Document findings.
7. Analyze findings.
8. Make recommendations, including individual employee and systemic corrective actions.
9. Communicate results to involved parties while respecting confidentiality and privacy.
10. Support corrective action in accordance with policies, including drafting communications. May include legal review.



11. Follow-up with involved parties to provide ongoing support and address lingering concerns.

Additionally, Emily can provide coaching and consulting to WTA leaders and HR staff on employee relations concerns using her knowledge and experience in this area as needed.

Emily can provide support to WTA's human resources department in the development and continuous improvement of existing policies, procedures, and tools to modernize and streamline processes as needed.

3. Communication, Customer Services, and Training

Emily is a collaborative partner with her clients. Communication can be tailored to the needs of WTA and the specific active project. Regular communication is essential for WTA to be able to monitor the progress of a project & input and direction is essential for Emily to provide applicable solutions. Routine progress reports can be provided in-person, virtually (e.g. zoom), or through email at WTA's preferred frequency. As a local Whatcom County resource, in-person meetings can be easily scheduled with Emily.

Emily derives immense satisfaction from fostering customer relationships. She employs the four C's of trust—commitment, caring, consistency, and competence—cultivating and nurturing enduring connections with her customers.

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4. Performance, and Quality Assurance

Relevant Project Experiences

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1616 Cornwall Ave, Ste 205

Bellingham, WA 98225

Shanon Hardie, Chief Operating Officer, shanon.hardie@ucnw.org, 360.788.2667

Danielle Crim, HR Director (former HR Manager), Danielle.crim@ucnw.org, 360.788.2622

Employed as HR Director 2011-2023



Responsible for employee relations policies, standards, and procedures. Actively worked with staff and leaders in response to allegations of misconduct or policy violations to investigate and recommend corrective action up to and including termination. Oversaw performance management program and human resources practices including onboarding, recruitment/selection, promotions, separations/terminations, and exit interviews.

Feedback

“Her experience, expertise, energy, and enthusiasm, create such an effective combination and result in innumerable contributions to our organization.” Unity Care NW

Average length of contract - N/A

Retired under WA State 2008 Early Retirement Factor (ERF)? No.

Contract default? N/A

Time extensions? N/A

Past or pending liens, claims, infractions, or citations for services? No.

Contract terminations for reasons other than the natural expiration? No.



Resume – Emily Boehm

Summary of Qualifications

Highly competent and organized **Human Resources** professional with more than 20 years of experience in attracting, retaining, and developing workforces, including recruiting & onboarding, classification, compensation, benefits, performance management, diversity, equity & inclusion (DEI), training, compliance, and investigations & employee relations.

- Cultivates meaningful relationships across diverse organizations, fostering enduring connections with front-line staff, managers, c-suite, and human resources teams.
- Navigates seamlessly through new roles and challenges, finding joy in refinement and exploration.
- Establishes trust through fair treatment, compassion, unwavering integrity, and modeling behavior.
- Addresses challenges with creativity and tenacity, consistently striving to enhance outcomes.

Professional Experience

Evergreen Workforce Consulting, Bellingham, WA **2023-present**

Founder & CEO

- Founded HR Consulting firm.
- Provides full-service Human Resources solutions including HR assessments, recruitment, retention strategies, development, and employee relations consulting.

Unity Care NW, Bellingham, WA **2011-2023**

Human Resources Director

- Responsible for the full range of human resources programs, including recruitment and selection, policy development and administration, compensation and benefits, employee recognition, organizational development, diversity, equity, and inclusion, leave management, employee engagement, safety, & employee relations.
- Led Board of Directors HR Committee and reported to Board of Directors quarterly.
- Built Human Resources team from two to ten employees to support growing organization.

Washington State Parks & Recreation Commission, Burlington, Washington **2009-2011**

HR Consultant 3 (Senior Level)

- Provided administrative direction and counseling regarding Human Resource issues, including classification, compensation, recruitment, corrective/disciplinary action, pre-grievance intervention, reasonable accommodation, employee development and performance management.
- Led HR functions independently for a regional area, reporting to headquarters in Olympia.
- Resolved conflicts by planning, developing and implementing strategies to ensure or improve employee relationships, including mediation when needed.
- Conducted investigations, documented and made recommendations to management.



Labinal, Inc., Everett, Washington **2007-2009**

HR Manager 2008-2009

- Led all Human Resources functions for 200 aerospace engineer/designer site as part of a multi-national corporation; coordination with headquarters in Texas. Supervised two direct reports.
- Over six-month period increased aerospace engineer headcount 35% to meet project contractual updates; reduced attrition from 21.2% to 8.8%.

HR Generalist 2007-2008

- Led recruitment activity both local & international, including interviewing candidates, recommending compensation packages and presenting offers to candidates for acceptance; extensive immigration work.
- Managed HR activities for new hire orientation, personnel status changes, leave of absences and benefits.

Friedkin Companies, Inc., Houston, Texas **2003-2007**

Benefits Analyst 2006-2007

- Managed all aspects of benefits program for company with more than 2,500 employees.
- Collaborated with compensation department on job evaluations, salary surveys, annual increases, and bonus calculations.

Benefits Specialist 2004-2006

- Administered eligibility of benefits plans, including answering employee inquiries, auditing and transmitting eligibility to vendors, and maintaining employee data in HRIS
- Oversaw workers' compensation and leaves of absence (disability, FMLA, USERRA), ensuring documentation and arrears payment.
- Led annual enrollment process, effectively communicated plan changes to employees through more than 50 presentations, and managed implementation with vendors.

Training Coordinator 2003-2004

- Coordinated logistical support for internal learning programs; assisted with planning, developing, and implementing employee and management training programs; and monitored budget expenses.

Education

BA, Willamette University

SHRM-SCP, Senior Certified Professional, Society of Human Resources Management

Diversity, Equity, & Inclusions (DEI) Certificate, Cornell University

Volunteering

Board member, SHRM Mt. Baker Chapter (2024)

Board member, Brigid Collins Family Support Center