



TECHNICAL PROPOSAL for RFP 25-016

Employee Leadership Coaching & Development Consultant

Section 1. Title Page Response to:



Dawn Koch, Procurement Manager
Central Ohio Transit Authority (COTA)
33 N. High St.
Columbus, OH 43215
614-308-4404
KochDM@cota.com

Response from:

Trisha Hall, VP Enterprise Solutions
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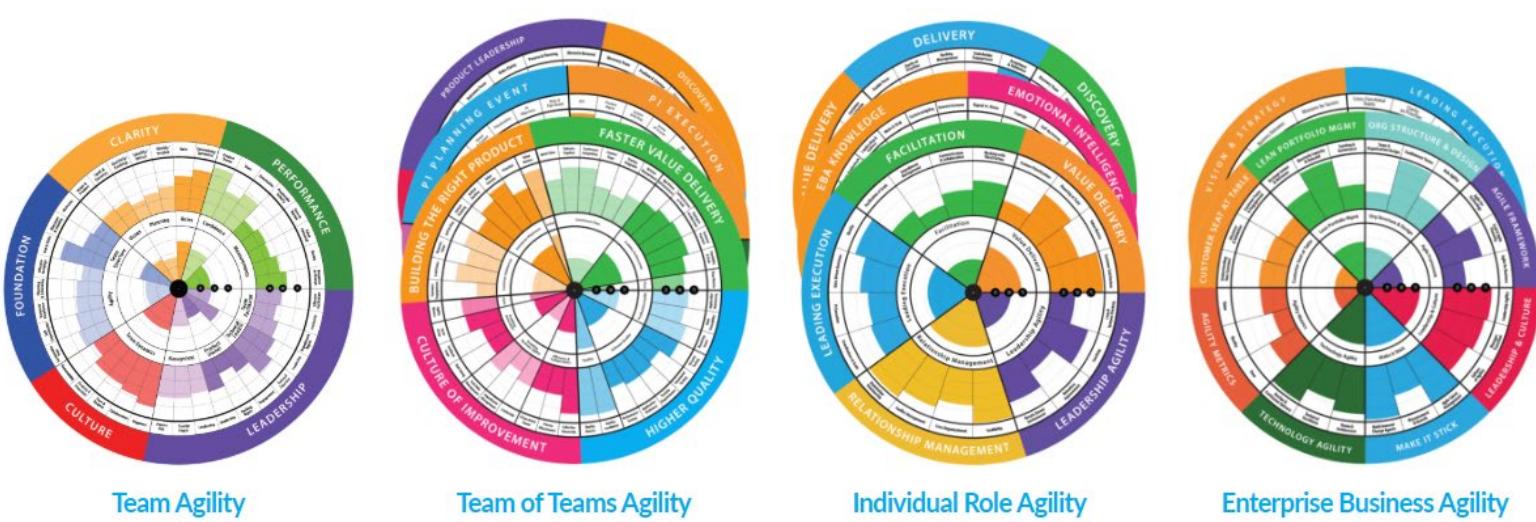
Delivered Via

[COTA Procurement Platform](#) Before 3/31/2025

Contents

Section 2: Transmittal Letter.....	4
Section 3: Personnel, Qualifications & Experience	6
Company Information	6
History.....	6
Differentiators	7
Financial Stability	7
Roles & Resumes	7
Organizational Structure for Project.....	8
Assigned Personnel	10
Core Competencies	10
Customization and Flexibility.....	12
Our Clients	12
Recent & Relevant Projects & References	13
Section 4: Technical Approach.....	18
Work Plan.....	18
Instructional Approach.....	18
Prework Interviews	18
Our Typical Deliverables	19
Coaching Enabled by Data	23
Improvement Plans	23
Facilitation Style & Approach	25
Interview/Focus Groups	25
Enterprise Business Agility Coaching & Workshops.....	26
AgilityInsights® JumpStarts	27
Courseware Licensing & Train the Trainer Program.....	28
Agility University Video Learning.....	29
AgilityInsights® Center of Excellence Portal	29
Interactive Teaching Approach	30
Communication and Reporting	30
Quality Assurance Program	31
Service Support (KPI).....	31

Quality Assurance (KPI)	31
Quality Control, Review, & Reporting	32
Section 5: Social Policies & Data Security	33
AgilityInsights® Diversity Inclusion Plan	33
Inclusion Policy.....	33
Environmental Policy.....	33
Data Security.....	34
Attachments.....	35
Affirmations	35



AgilityInsights® Radars

Visualize maturity and performance insights from your assessments in our stunning Radars. Our assessments help you quickly measure current state, build actionable plans, and enable self-learning and growth at all levels of your organization.

SECTION 2: TRANSMITTAL LETTER

March 31, 2025

Dawn Koch, Procurement Manager
Central Ohio Transit Authority (COTA)
33 N. High St.
Columbus, OH 43215
614-308-4404, KochDM@cota.com

Dear Ms. Koch and Ad Hoc Committee Members:

Thank you for the opportunity to submit our proposal for RFP 25-016 Employee Leadership Coaching & Development Consultant for Central Ohio Transit Authority (COTA). Our response to this RFP is 100% responsive to and 100% compliant with the RFP and the COTA bid portal. We have attached a detailed technical response in order to showcase our full capability and capacity to fulfill COTA's requirements. We feel confident you'll make the decision to add our facilitator and Ohio-based coaches to this project.

In the following pages and the documents and responses, you will discover a proprietary technology system that underpins the sustainable success of our leadership coaching, training, and facilitation practices. Agile Transformation, Inc. DBA AgilityInsights®, is a tech- and data-driven leadership training company that also brings its heart to every moment of every engagement. Our 4-in-1 platform gives you the following capabilities:

1. **Structural Agility:** visualize and measure the operating model and structure of your organization across agile, non-agile, business and technology teams.
2. **Strategy and Outcomes:** we've built a robust strategy management capability that is based on modern outcomes/OKRs. You can now manage Business or Transformation outcomes, align your initiatives to key results and track end to end progress. Integrations are also available.
3. **Performance:** Leveraging integrations and built in capabilities, we can measure flow, predictably, quality to help teams and leaders combine quantitative metrics on actual performance with the maturity and OKRs.
4. **Maturity and Change Management:** Our extensive radars enable you to measure individual and team ways of working, culture, and overall maturity.

We have been providing the services you require since 2009 for government agencies including NASA, US Strategic Air Command, USAF, USDA, and the FBI. Our founder,

Sally Elatta, came to the U.S. in 1998 with a dream of building a business that can make a big impact on executive leadership and their teams. She's an entrepreneur and a thought leader in the agile, measurement and leadership coaching, training and facilitation space and a frequent keynote and industry speaker. She and our entire team advise front-line supervisors, managers, senior managers, directors, and senior executives on transformational strategies.

With 95 employees, we regularly provide synchronous (instructor-led virtual or in-person) and asynchronous (online) coaching, training, and facilitation for individuals and groups of 100+/- and have extensive experience with foundational through advanced executive leadership tracks. Our coaches develop close relationships with your leaders to guide them on their path to exceptional skills and capabilities.

We have not marked any information in our proposal as confidential and we have no exceptions to the solicitation documents. We also will not be using subcontractors to fulfil COTA's requirements. Furthermore, we always comply with federal, state, county and municipal laws and our clients' regulations. We proudly participate extensively in Diversity, Equity, Inclusion, Belonging and Justice (DEI-B-J) practices and are an Equal Opportunity Employer (EOE). AgilityInsights® is also a passionate practitioner of industry and business ethics.

We look forward to interviews and/or making a presentation. We are always amenable to negotiating, in good faith and effective for 90 days from being set, a best and final offer (BAFO). Above all, we very much look forward to working with your talented people.

With full understanding of the services required by the RFP and the scope of services, and the authority to bind and warm regards, I am your point of contact,



3/31/25

Trisha Hall, VP Enterprise Solutions Date
Cell: (402) 507-6223, trisha@agilityinsights.ai

Cert #MP01275



SECTION 3:

PERSONNEL, QUALIFICATIONS & EXPERIENCE

Company Information

HISTORY

AgilityInsights® is a certified minority woman-owned small business (WOSB) located in Omaha, Nebraska. We incorporated in 2009 and began our work with government agencies in 2012. We worked with several divisions at USDA starting in 2014 and continued our work there until 2020. Additionally, we have worked with CMS, OMB, and DHS, and are currently working with NASA, the FBI, the Federal Reserve Banks, and many mid-size companies and Fortune 500 and 100 companies.

Our proprietary platform, AgilityInsights®, is in use around the globe to assess teams and individuals on the health and maturity of where they are today and build continuous improvement programs based on the results. We have incorporated a learning capability, our Center of Excellence Portal, into our platform so that we can help answer the question of "Now what?" based on where your employees are today. In this Portal, employees will find recommendations on how to improve on a competency level as well as curated learning by competency.

We are excited to share our platform with you and explore the possibilities for COTA as we learn more about your specific needs. We can customize our platform to your specific roles and responsibilities so that you are able to truly achieve your strategic goals.

Here are some milestones in the history of AgilityInsights®:

- ⇒ 2009: Agile Transformation, Inc. (ATI) was co-founded by Sally Elatta and Kal Khalafalla
- ⇒ 2011: ATI launched its first and largest AgileVideos eLearning platform
- ⇒ 2014: AgilityHealth was launched
- ⇒ 2016: AgilityHealth introduced the Enterprise Business Agility (EBA) Strategy Model and became a founding member of the Business Agility Institute
- ⇒ 2017: AgilityHealth introduced Talent/HR, EBA, and Leadership Radars
- ⇒ 2018: AgilityHealth introduced Individual Role Radars
- ⇒ 2019: AgilityHealth introduced the Global AgilityHealth Index, the first edition of the Business Agility Report, and an Integrated Business Outcomes Dashboard

- ⌚ 2021: Published the Top Predictors of Team Performance Report in partnership with Deloitte and the Business Agility Institute
- ⌚ 2022: Held Acceleration virtual customer summit
- ⌚ 2023: Introduced Continuous Improvement Champion (CIC) certification
- ⌚ 2024: Introduced Business Outcomes Champion (BOC) certification; added large language models and AI integration to the AgilityInsights® platform
- ⌚ 2025: Moved to the AgilityInsights® brand

Our **mission** is to help organizations build high-performing teams, accelerate enterprise agility, and enable strategy to execution by measuring and improving at every level. Our **vision** is to be a leading global benchmark of agility data. AgilityInsights® combines both qualitative and quantitative metrics to give you a clear view of your teams while measuring their maturity, performance, and outcomes in one view.

DIFFERENTIATORS

1. We have a comprehensive team management platform that allows you to see how work flows through your system, measure the maturity of these teams, help them to learn and create continuous improvement programs and align them to outcomes all in one system.
2. We incorporate learning with our measurement, so not only do teams and individuals identify where they are today, they have a roadmap to the next point in the journey and tools to help them get there.
3. We have heavily invested in the visuals for our platform, making it easy to understand what's happening in your team or organization at a glance.
4. We are incorporating smart AI into our platform so that organizations can more quickly analyze their own data to make decisions.
5. We are SOC 2 Type 2 certified for both privacy and security and are FedRAMP ready (sponsorship is pending).

ROLES & RESUMES

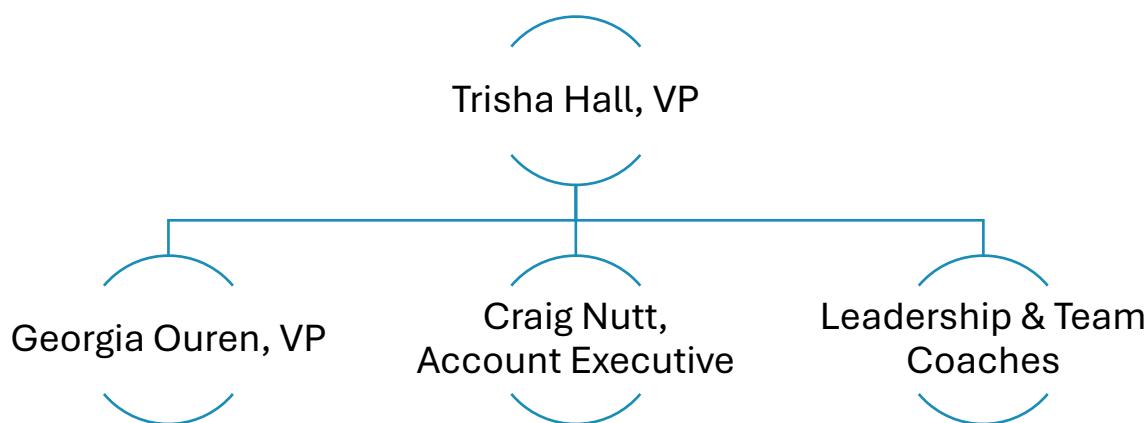
Our key staff for this project are:

- ⌚ Trisha Hall, VP – Enterprise Solutions - responsible for overall engagement
- ⌚ Georgia Ouren, VP – Government & Partner Enablement - responsible for enablement of the AgilityInsights® platform

- ⦿ Craig Nutt, Account Executive – responsible for procurement & contracting
- ⦿ Joan Gammon, Enterprise Strategist – Leadership & Team Coach
- ⦿ Samar Sokolski, Enterprise Strategist – Leadership & Team Coach

The following brief biographies well demonstrate the scope of ability and experience the AgilityInsights® team brings to bear on your learning program. They are authorized to make representations on behalf of AgilityInsights®.

ORGANIZATIONAL STRUCTURE FOR PROJECT



Sally Elatta, Founder & CEO



AgilityInsights® is led by founder and CEO Sally Elatta. Sally is a thought leader in the Agile and Business Agility space and a popular webinar presenter for the Project Management Institute. A career coach and trainer, she's passionate about accelerating the Enterprise Business Agility journey by measuring what matters at every level and building strong leaders and strong teams. She is an executive advisor to many Fortune 500 companies and a frequent keynote speaker. sally@agilityinsights.ai, 402-858-0529

Her best-in-show executive team includes:

Srikanth Victory, Chief Technology Officer



As Chief Technology Officer, Srikanth leads AgilityInsights®'s technology strategy and oversees our product platform and product operations. Srikanth is an industry thought leader with robust experience leading large transformations and is strengthening the company's Digital Transformation, Scalability, and Data Analytics competencies. He holds dual master's degrees in Business Administration from Webster University and

Mathematics from the University of Madras in India.

srikanth.victory@agilityinsights.ai, 402-858-0529

Trisha Hall, Vice President, Enterprise Solutions

Trisha has been part of AgilityInsights®'s Omaha, Nebraska-based leadership team since 2014. She brings 25+ years of experience in project and process management to her role as Vice President of Enterprise Solutions, helping organizations bring Business Agility to their companies and helping corporate leaders build healthy, high-performing teams. Trisha previously held positions at Blue Cross Blue Shield of Nebraska, Valmont, The Gallup Organization and Professional Veterinary Products. She is a graduate of Rockhurst University and is an ICAgile Certified Professional – Business Agility Foundations, as well as an Emergenetics Certified Associate. trisha@agilityinsights.ai, (402) 507-6223

Georgia Ouren, Vice President, Partners & Government

As part of the Omaha, Nebraska-based leadership team since 2015, Georgia is fiercely dedicated to helping AgilityInsights® achieve success in enabling customers in their transformation journeys. She brings two decades of experience in business continuity and large-scale customer implementations to her role as Vice President of Product and Acquisitions and held product leadership and production roles with both GiftCertificates.com and Election Systems. A Certified Scrum Product Owner, Georgia is a graduate of East Carolina University. georgia@agilityinsights.ai, 402-858-0529

Dawn Thiem, Senior Vice President, Customer Success & Enablement

Based in Omaha, Nebraska, Dawn joined AgilityInsights® in 2015. As Senior Vice President of Customer Success & Enablement, Dawn oversees the delivery, enablement, and strategist teams. Dawn has two decades of experience in project management and management consulting, holding senior consulting positions at Blue Cross Blue Shield of Nebraska and Mutual of Omaha before joining the Company. She holds a Bachelor's degree from the University of Nebraska at Omaha and an MBA from Bellevue University. Dawn is also an ICAgile Certified Professional – Business Agility. dawn@agilityinsights.ai, 402-858-0529

Kal Khalafalla, Co-Founder & Finance Leader

Kal Khalafalla co-founded AgilityInsights® with his wife, Sally Elatta, in 2009. A scientist by training, Kal brings a data-driven approach to company finance, remaining actively involved in overall business operations. Based in Omaha, Nebraska, Kal received a Bachelor's degree of Applied Sciences from Iowa State University. kal@agilityinsights.ai, 402-707-0808

ASSIGNED PERSONNEL

AgilityInsights® has 95 employees including a has a pool of over 50 Leadership and Team Coaches. Upon award, we'll be able to give COTA a full roster of those participating in this project. Because we have multiple large-scale projects in play at all times, we need to know when our work will commence to cherry pick the right people for it. At times, we even take personnel off other projects if they have a specific skill needed in yours.

Core Competencies

AgilityInsights® is the world's leading measurement and continuous improvement platform designed to accelerate the maturity and productivity of teams and organizations embracing agile and digital transformation. The platform enables government agencies to:

- ⦿ Visualize and manage your team structure, understand your team stability, role allocation and team makeup
- ⦿ Get a baseline assessment and improve maturity for Agile, Culture, DevOps, SAFe®, Product, Portfolio, and other domains
- ⦿ Visualize the three metrics in one platform (maturity, performance, outcomes/OKRs)
- ⦿ Save millions by identifying gaps early and use data to mitigate performance risks.
- ⦿ Measure mission outcomes/OKRs and ensure teams are aligned to outcomes
- ⦿ Develop talent and develop the individual and team capabilities to adopt new ways of working

The AgilityInsights® platform provides maturity (qualitative), performance (quantitative) and outcomes data for informed decision-making. Our approach to addressing these specifically is to focus on explaining the desired outcomes. In later sections we will show the tools and processes we use to do so.

Conflict Management

We work with agencies and organizations to develop modern leadership skills that encourage conversation, constructive conversations, and the ability to manage conflict in a way that engages leaders and enables a healthy culture. We teach leaders to identify unhealthy leadership behaviors in themselves and others and how to manage these behaviors and move to a growth mindset where they can lead differently. We help leaders focus on a growth mindset; this success was evident in our work with US Strategic Command J6 as we helped them implement a new program and establish new leadership.

Developing Others

As we work to help leaders develop others within the organization, we often have to help leaders shift from a command-and-control style of leadership to one of empowerment. We help individuals identify why they lead this way and then learn how to shift to an empowering style of leadership that will help them to develop others. Much of this learning is based on the work of David Marquet. We incorporate his teachings on the Ladder of Leadership™ as we shift to a style of developing others.

Team Building

Leaders foster team building most effectively when they remove themselves as the middleman and help team members to create channels of communication and connections between groups that will last. In this area, leaders learn that it's not about relinquishing control, instead they learn it's more about exercising indirect control by selecting the right people, creating the right environment, encouraging open and honest feedback, anticipating mistakes and allowing the group to hold each other accountable.

Accountability

Part of our program teaches that Leadership Agility happens at three levels: at the individual level, at the team level and at the organizational level. Each of these levels has different objectives and responsibilities and is responsible for their actions and is accountable to the other levels.

Individuals are charged with having a growth mindset, listening, and sharing the vision of what's needed. The team is to foster collaboration, remove any impediments and to hold the individuals accountable. The organization is there to model the culture, manage change, and build the overall systems.

Decisiveness

Leaders can learn how to make decisions without being directive when the environment has been designed with conditions that favor collaboration and ownership. When the communication structures create a smooth flow of information, create transparency, and an understanding of where to go to resolve impediments then decision-making is much easier at all levels in the organization. It is easier to introduce practices that allow for more effective communication, adaptive planning and emergent design and delivery.

Problem Solving

One of the key areas we teach is learning the difference between technical problems and adaptive challenges. Effectively being able to distinguish between the two and understanding how to approach both types of problems will help leaders to more effectively work with their teams and in their organizations. Technical problems are those to be solved for processes and tools, while adaptive challenges are those issues dealing with individuals and

interactions. Both need to be managed, but in very different ways. When leaders can effectively identify and work through problem solving for both types of issues, they will be more effective for the organization.

Interpersonal Skills

We have found that good interpersonal relationships start with the most basic, and most difficult, of skill – active and genuine listening. Often leaders feel like they know best and unintentionally shut down the suggestions of team members because they have already decided what's best or on the solution. Learning how to listen and understand the three levels of listening will help engage leaders in developing stronger interpersonal skills. Engaging active listening skills where the intent is to listen to understand will help others feel more engaged, respected, and understood.

Customization and Flexibility

We consider the work we have done and our approach to truly be a framework; what we have built in our platform and courseware is based on experience and best practices, but we understand that organizations often need a customized approach based on their specific needs. We are happy to accommodate these needs so that our customers are successful. We understand that each organization and their challenges are unique – while a basic formula may help us to get most of the way to a solution, making custom adjustments will help everyone get to the finish line.

For our engagements we prefer to start with an Implementation Strategy Session, where we work with our customer to define the problem they are trying to solve, the solution we have proposed, the timeline, the primary points of contact on both sides, etc. to ensure everyone is aligned. We prefer to have quarterly checkpoints with our customers to get feedback, understand if there have been changes in scope, or address any unplanned or unforeseen challenges we are facing. When we are able to establish and maintain these open lines of communication, we are more successful in delivering a project that both fits our customers' needs and stays aligned with their ever changing goals.

Our Clients

Number of Clients: 72

Average client size (i.e., employee count): 14,243

Locations where the AgilityInsights® solution has been deployed:

- US
- Saudi Arabia
- Europe
- Australia
- South Africa
- South America

Recent & Relevant Projects & References

Government References



REFERENCE 1	
Project Name	AgilityInsights® Implementation NCCS SAT Team
Agency Name	NASA
Department Name	Shared Services Center
Contact Name, Title	Heather Thomas, Deputy, Web & Cloud Service Office
Email Address	heather.n.thomas@nasa.gov
Telephone Number	281.483.0901
Mailing Address	NASA/Marshall Space Flight Center Bldg. 4631, Saturn Rd Huntsville, AL 35812
Project Description	<p>Access to the platform to support continuous measurement and improvement of team health and development of Agile talent.</p> <p>Includes (5) AgilityInsights® Team Health Facilitator certifications & SSO for the first 100 participants.</p> <p>There will be an additional charge for SSO more than 100 users.</p>
Project Amount	\$95,000
Project Start/Finish Dates	12/2022 – 12/2023



REFERENCE 2	
Project Name	USSTRATCOM Agile Pilot
Agency Name	US Strategic Air Command
Department Name	J6
Contact Name, Title	Ms. Kerry Kelley, Chief Information Officer & Director of Computer, Communication and Cyber Security Systems

Email Address	KelleyK@stratcom.mil
Telephone Number	402.294.4130
Mailing Address	900 SAC Blvd, Offutt AFB, Bellevue, NE 68113
Project Description	<p>Agile Transformation Inc. met with the CIO of the J6 division to define a strategy for execution of the Agile Pilot. The following key strategy points were identified for the engagement:</p> <p>Organization: Implement a program comprised of one team to focus on the Service and Process implementation and a second team to focus on the implementation of the new Remedy environment. The Program would be overseen by a Program Agile Coach who would provide Agile team and program coaching and support both teams.</p> <p>Staffing: Staff the team with motivated individuals who are equipped with the right skills to optimize the potential for success on the Agile Pilot. It was recommended that a Program Agile Coach be engaged to support the adoption of Agile values and principals as well as support the Program level engagement.</p> <p>Training: Provide comprehensive Real World Agile Training for the teams, Product Owners, Leadership and Stakeholders prior to initiating the Agile program.</p> <p>Team Health Assessment: Conduct a program assessment to provide visibility into the performance and health of the Agile Pilot and develop actionable growth plans.</p>
Project Amount	\$115,000
Project Start/Finish Dates	10/2015 – 6/2016



REFERENCE 3	
Project Name	FBI AgilityInsights® Pilot
Agency Name	Federal Bureau of Investigation
Department Name	ITAU - INFORMATION TECHNOLOGY ACQUISITION UNIT
Contact Name, Title	Shannon L. Friend

Email Address	sfriend@fbi.gov
Telephone Number	N/A
Mailing Address	Planning and Control Unit 1000 Custer Hollow Road Module B-2 Clarksburg, WV 26306-0001
Project Description	AgilityInsights® Measure & Grow platform tool for up to 50 teams (500 people) to include single sign on functionality and private domain & database. AgilityInsights® in-person facilitation, training, coaching and implementation support.
Project Amount	\$126,000
Project Start/Finish Dates	8/2023-8/2024

Private Company References



REFERENCE 1	
Project Name	Multi-Year Transformation to Enterprise Business Agility®
Firm Name	Erie Indemnity Company, Erie Insurance
Department Name	
Contact Name, Title	Gretchen Clorley, Enterprise Business Agility Manager
Email Address	Gretchen.Clorley@erieinsurance.com
Telephone Number	814-323-9605
Mailing Address	100 Erie Insurance Place Erie, PA 16501
Project Description	<p>Erie Insurance, a large property and casualty insurance company selling a variety of auto, home, business and life insurance through a network of independent insurance agents, was stuck in a short-term and project-based mindset. They started their Business Agility journey in the spring of 2021.</p> <p>With the help of a small stakeholder group of executives, the company continues to pursue its reach to full Enterprise Business Agility adoption across the entire 6,500-member team. These efforts include</p>

	<p>adopting Agile principles such as Scrum, Kanban and growth planning at all levels of the organization – enterprise, portfolio, program, and delivery (project).</p> <p>Services delivered include seven (7) embedded enterprise level coaches to deliver executive, portfolio and program coaching, training on agile and related topics, on-demand learning through AgileVideos.com and a full deployment of the AgilityInsights® platform across 65 teams for team structure, measurement and continuous improvement.</p>
Project Amount	\$10M+
Project Start/Finish Dates	6/2021 – Present



REFERENCE 2	
Project Name	Fidelity Team Maturity
Firm Name	Fidelity Investments
Department Name	Enterprise Agile Office
Contact Name, Title	Dan Kim, Advisor, Enterprise Agile Office
Email Address	dan.kim@fmr.com
Telephone Number	617-480-8147
Mailing Address	245 Summer Street Boston, MA 02210
Project Description	AgilityInsights® Measure & Grow Platform for 2,000 teams, private database and SSO, Premium Support. Prepare, Practice & Review sessions, online AgilityInsights® Facilitator Certification, Continuous Improvement Champion Certification
Project Amount	\$4.8M+
Project Start/Finish Dates	3/2019 – 12/2024



REFERENCE 3	
Project Name	Norfolk Southern Transformation

Firm Name	Norfolk Southern Railway
Department Name	Lean Portfolio Office
Contact Name, Title	Dana Buttera, Director
Email Address	Dana.Buttera@nscorp.com
Telephone Number	470-463-6884
Mailing Address	3 Commercial Plaza Norfolk, VA 23510
Project Description	<p>Norfolk Southern wanted their teams to be able to deliver faster, with higher quality work that was aligned to the right outcomes. They were looking to test (pilot) working in an agile way with three of their teams and then expand from there if the pilot was successful. At the same, they wanted to build internal capabilities to ensure the new ways of working stick.</p> <p>Transitioned additional teams to an agile way of working to continue to increase flow, value, and quality.</p> <p>Norfolk Southern engaged us to do team level coaching and training, licensed our courseware and trained two internal instructors, and have licensed the full AgilityInsights® platform.</p>
Project Amount	\$1.8M +
Project Start/Finish Dates	3/2020 - Present

SECTION 4: TECHNICAL APPROACH

Work Plan

AgilityInsights®'s acknowledges and affirms COTA's requirements in their entirety. In this section, we detail what we deliver and how we deliver it, customized to COTA's specific values, culture, people, and much more.

INSTRUCTIONAL APPROACH

We consider our instructional approach to be more "workshop" oriented rather than strictly training, even when the coaching is one-on-one. We understand that learning needs to be something that is practiced, not just something that is heard. Our courses are designed to be interactive in nature, so whether we are in-person or teaching virtually we like to engage with our audience through activities. We average a learning activity every 10 slides or less in the learning material; content will be more meaningful and more easily retained if it is used during the learning experience.

We often work with our clients to customize the learning experience, bringing in examples from their work or organization so that the learning feels more applicable to the participants. We work with our clients to ensure that the coaching and workshops are engaging and contextual for the participants.

Great leaders are high-performing, they deliver measurable business outcomes, they continuously improve, they are creative, talented and happy. We enable this through:

- ⦿ Our powerful measurement and growth platform
- ⦿ Our scalable learning and enablement resources
- ⦿ Our jumpstart programs

As our name implies, our goal is to infuse learners with insights in all professional walks of life with – among many other things Conflict Management, Developing Others, Team Building, Accountability, Decisiveness, Problem Solving and Interpersonal Skills – the Agile way.

PREWORK INTERVIEWS

Our prework/pre-coaching and workshop interviews will be strategically designed to capture essential feedback, ensuring that the coaching and workshops effectively address critical areas of concern. We will implement the following strategies:

- **Customized Questionnaires:** We will utilize structured interview formats that allow us to gather detailed insights from stakeholders. This methodology

enables the collation of both qualitative and quantitative data, transforming them into meaningful metrics that can inform our coaching and workshop agenda.

- **Data-Driven Insights:** In line with the practices used in AgilityInsights® assessments, we will collect data through surveys and individual assessments. This process will facilitate the gathering of perspectives from key stakeholders. Such a comprehensive data collection method ensures that all relevant viewpoints are considered, allowing us to tailor the coaching and workshop content to meet COTA's needs effectively
- **Visual Representation:** To enhance clarity and engagement, we can incorporate visual elements, such as dashboards or assessment metrics, similar to those used by COTA. This will illustrate how stakeholder inputs are synthesized and analyzed in preparation for the coaching and workshop, providing a clear visual context that can guide discussions and decision-making

By employing these methods, we will ensure that the prework/pre-coaching and workshop phases are thorough and focused, laying a strong foundation for a productive coaching experience.

OUR TYPICAL DELIVERABLES

The key to our success and yours is our proprietary AgilityInsights® platform and extensive suite of assessment applications. Our technology and our practices are deeply rooted in the methodologies of agile. When we perform executive coaching, we focus on all the principles of agile, but in case you want a tiny refresher on being an agile executive, we like this succinct description from Stanford University:

Adaptability is key to innovation and effective team management. Productive and happy executives are comfortable with flexibly and creatively responding to and working in constantly changing and oftentimes unpredictable environments. These leaders unleash their creativity and maximize their agility across the myriad of roles they assume. Through our interactive exercises and evidence-based techniques, you will practice and hone your ability to innovate, problem-solve, and lead effectively... no matter what.

The following deliverables will be provided throughout the contract term:

1. Leadership Development Plan

AgilityInsights®' robust measurement and continuous improvement platform has enabled many Fortune 500 companies and several government agencies to foster a culture of executive education, personal development and innovation. These changes significantly improve leader ability to achieve their individualized development and transformations by helping them to mature their ways of working and develop through consistent and objective measurement cycles combined with continuous improvement methodologies. Each individual plan will serve as a roadmap for optimal achievement of COTA's objectives.

2. Initial Check-In Meeting

AgilityInsights® performs prework/pre-coaching interviews as frequently as needed in preparation for sessions. These include, but are not limited to:

- **Customized Questionnaires:** with structured interview formats that allow us to gather detailed insights from the executives (and their teams if necessary). This methodology enables the collation of both qualitative and quantitative data, transforming them into meaningful metrics that can inform our coaching agenda.
- **Data-Driven Insights:** In line with the practices used in AgilityInsights® assessments, we will collect data through surveys and individual assessments. This process will facilitate the gathering of perspectives from executives. Such a comprehensive data collection method ensures that all relevant viewpoints are considered, allowing us to tailor the coaching and workshop content to meet COTA's needs effectively
- **Visual Representation:** To enhance clarity and engagement, we can incorporate visual elements, such as dashboards or assessment metrics. This will illustrate how executive inputs are synthesized and analyzed in preparation for the coaching sessions.

3. Individual Coaching Sessions

AgilityInsights® will deploy services that will include as many enterprise level coaches as needed to deliver executive coaching, training on agile and related topics, via individual sessions. We also offer on-demand learning through AgileVideos.com and a deployment of the AgilityInsights® platform across all executives (and their teams for team structure, measurement and continuous improvement, if desired).

4. Unlimited Support

The executives participating in this program will have the contact information for their coaches – email, phone (for texting, calls, WhatsApp, etc.) so that they can

reach out to their coach as needed for help or support. We anticipate these needs will ebb and flow through the year and vary from participant to participant. Additionally, our platform has on-demand learning on hundreds of topics, so participants will have access to self-guided learning in addition to their executive coach.

5. Direct Observation

AgilityInsights® can easily perform environmental scanning and deploy shadows for various executives prior to or immediately after the pre-work meetings. We expect that the tools on our platform will deliver information that will make this practice unnecessary, but we do make it available on an as-needed basis.

6. Mid-Point Progress Check-In

The AgilityInsights® platform allows us to generate periodic reports that we use for mid-program check-ins, evaluations and adjustments. This enables the executives and their coaches to make direction changes and make modifications to the coaching sessions if and as needed. We recommend a formal six-month measurement to trend progress for all participants.

7. Confidentiality

Confidentiality is a cornerstone of our one-on-one executive coaching sessions. Our platform maintains confidentiality for participants and, if used, will show collective, anonymized data for the cohort.

8. Development Assignments

The AgilityInsights® platform is designed specifically for continuous improvement and learning. This ongoing and/or mid-coaching continuous improvement and learning is provided on our platform through such vehicles as AgilityInsights® JumpStarts and Agility University Video Learning. Our platform will track the progress of these assignments over time and can report on the progress of these assignments as needed.

9. 360-Degree Assessment and Debriefing

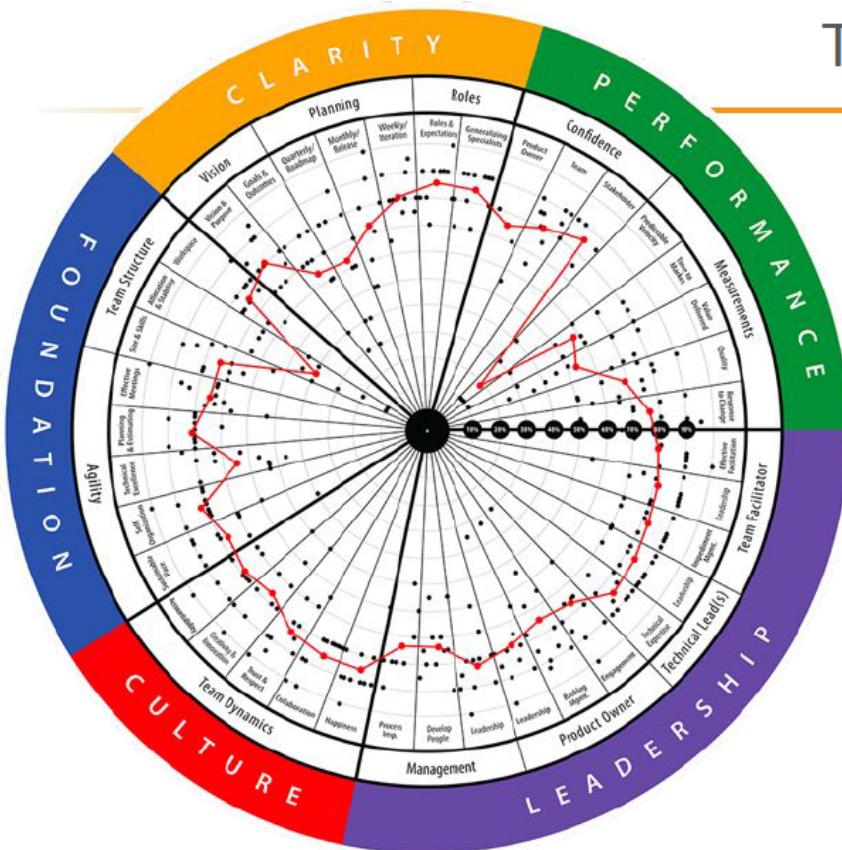
With the AgilityInsights® platform, in our Talent Development assessments we have the flexibility of having a "180 Assessment" where the executive rates themselves only, or a "360 Assessment" where the executives rate themselves but also gets feedback from others. Those "others" can be broken into several categories, depending on the type of role being assessed, so that we can see the feedback from peers separate from upstream/downstream interactions.

10. Assessment Review

In the discovery stage, while the AgilityInsights® assessments are being performed, our coaches are always amenable to reviewing the prior assessments of each executive. Furthermore, we help individuals identify why they lead this way and then learn how to shift to an empowering style of leadership that will help them to develop others. Much of this learning is based on the work of David Marquet. We incorporate his teachings on the Ladder of Leadership™.

11. Final Check-In and Continuation Plan

In this final check-in and continuation plan, the coach will review the final assessment results, the growth the participant has made over the year, and will help document the continued improvement plan and who will help the participant remain accountable for continued improvement on their development. We strongly encourage the participants form a learning cohort that works together to continue to grow together and work on their leadership skills; we have found that development continues more frequently in communities of practice.



The TeamHealth® Radar

Clarity

Do we have clarity on our vision and outcomes? Do we have clear plans? Do we understand our roles?

Performance – Quantitative

How often does the team release to production? What's the mean time to recover? What is the story and feature cycle time? How is our quality, test automation and defect ratio?

Leadership

Is their leadership team providing effective leadership? Are they playing their roles well? Do they remove obstacles, develop people, manage the overall Agile process effectively?

Culture

How happy and engaged are team members? Is collaboration valued and do the team trust and respect each other? Are teams empowered to be creative and innovative?

Foundation

Does the team practice the core Agile practices effectively? Do they know how to plan, have effective meetings, work a sustainable pace and follow healthy technical practices? Are they setup for success?

COACHING ENABLED BY DATA

AgilityInsights®'s robust measurement and continuous improvement platform has enabled many Fortune 500 companies and several government agencies to foster a culture of education, personnel development, and innovation. These changes have significantly improved their ability to achieve their Strategic Plan by helping them to mature their ways of working and develop their personnel through consistent and objective measurement cycles combined with continuous improvement methodologies. As the world of labor-management becomes increasingly more complex, it is imperative that leaders and individual contributors develop competencies that bolster innovation because maintaining a competitive advantage is largely dependent on COTA employee's capacity to quickly adapt, develop, and maintain innovative skill sets with the intent to solve complex problems in dynamic contexts.

The approach of using employee assessments allows for the voice of the employee to be heard and used in the creation of a curriculum and skill development roadmap by collaborating with COTA leaders and team members. To see videos of our platform in action, please visit <https://agilityinsights.ai/leadership-agility-talent-development/>.

With the AgilityInsights® platform, in our Talent Development assessments we have the flexibility of having a "180 Assessment" where the employee rates themselves only, or a "360 Assessment" where the employee rates themselves but also gets feedback from others. Those "others" can be broken into several categories, depending on the type of role being assessed, so that we can see the feedback from peers separate from upstream/downstream interactions, as well as leaders and potentially those led by an employee.

Separate from the Talent Development assessments we have Skills Assessments where an employee rates their skills in each area from Beginner to Expert as an example; the scale is customizable. As an example, the ratings can be based on the number of years they have been using that skill and their ability to teach it to others. We can also incorporate quantitative questions, so if you wanted to understand the number of times a skill had been delivered or the quantity of elements completed, we can collect this data as well.

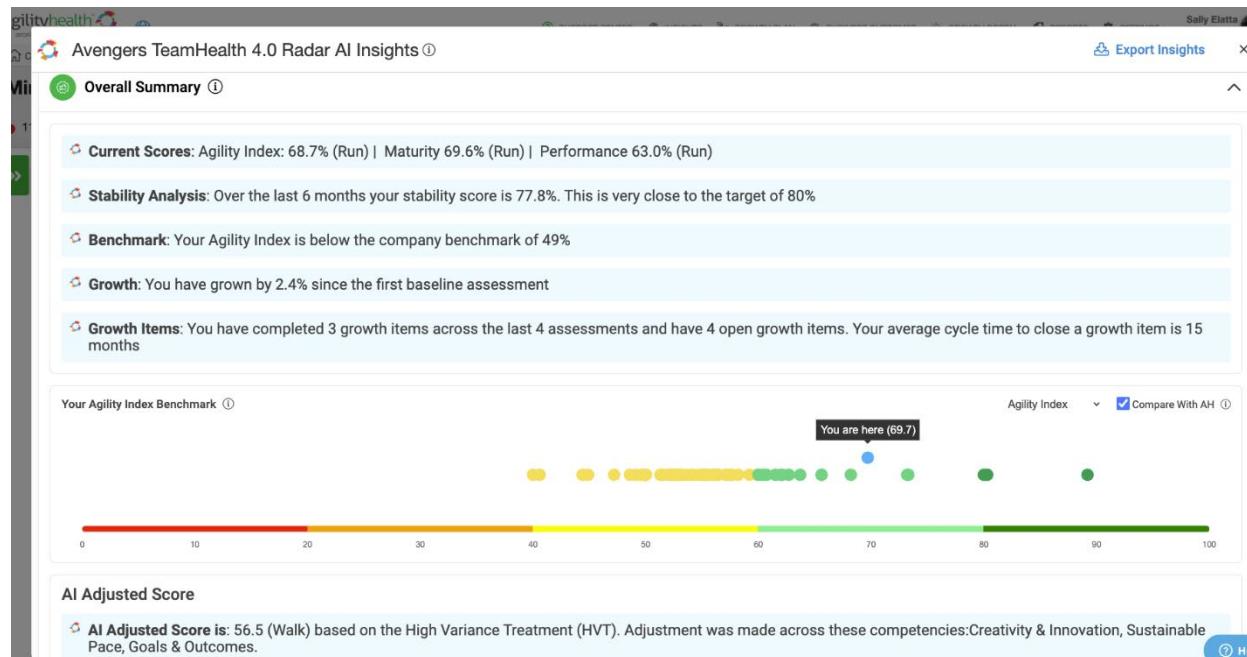
IMPROVEMENT PLANS

Once the assessments are completed, we use Artificial Intelligence (AI)/Machine Learning (ML) within our platform to aid in assessing the team skills data and developing improvement plans – and, as such, providing added value in employee skill development. Proposed AI/ML solutions will ensure COTA leaders predict appropriate growth areas for employees and apply the most effective interventions based on data collected from teams/individuals with similar characteristics and contexts across all developmental areas.

AI/ML team development solutions directly support COTA Strategic Capability to organize, train, and equip employees with the necessary skills and develop

leadership capacity/competencies, fosters a culture that embraces continuous improvement efforts, and ensures individual employee readiness to identify and learn new skill sets while ensuring productivity over COTA's competition.

As we look to develop employee skills after the assessment, we have a Center of Excellence portal available that can be populated with recommendations for how to grow or get better in a specific skill, areas to add learning – both video and written content, as well as any available training you may have available. As with the other areas of our platform, this portal can be customized to fit the roles at COTA so that the learning is meaningful.



When there are multiple employees that take the same skill assessment, this data can be collated to look at all the data from this role together in an anonymized format to analyze the information to look for patterns in the data – what are common areas of strength, what are common areas of need, are there any anomalies that should be investigated further? Our intent would be to train individuals inside of COTA to be able to understand these results and analyze the data points appropriately.

The AgilityInsights® platform will help COTA foster a culture that embraces continuous improvement and innovation by further developing leaders' capacity and competencies to engage employees in assessing team performance, analyzing performance data/feedback, identifying areas of developmental need and co-constructing improvement plans. Widespread implementation of new ways of working has provided many outcome-oriented companies with a competitive advantage in highly disruptive marketplaces since 2001.

As more organizations are adopting "agile" management frameworks, innovative solutions must be developed and adapted to continue to add value in unique contexts. Recent advancements in open-source AI/ML data analysis and text

generation tools have the potential to predict appropriate areas for team and individual skill assessment and development as well as, recommend effective interventions based on data sets collected from teams with similar characteristics and contexts across multiple areas within COTA.

FACILITATION STYLE & APPROACH

We believe that well-facilitated sessions within an organization should be ones where participants feel they can fully share their thoughts and feelings on a particular topic and where everyone gives full participation in the session. We use a variety of facilitation techniques to enable our participants to engage in effective listening, questioning and information gathering; if these skills are not inherent in the group, we are comfortable teaching these skills as part of our process.

We understand that part of our role as facilitators is to manage any of the common dysfunctional behaviors we see in a session, and help our participants learn emotional intelligence and how to respect any cultural differences that need to be addressed. One of the primary keys to a successful group session is having an effective facilitator that can not only organize the meeting, but that can govern it and skillfully guide the team toward achieving their goal for the session.

Several of the concepts we may use in a session are:

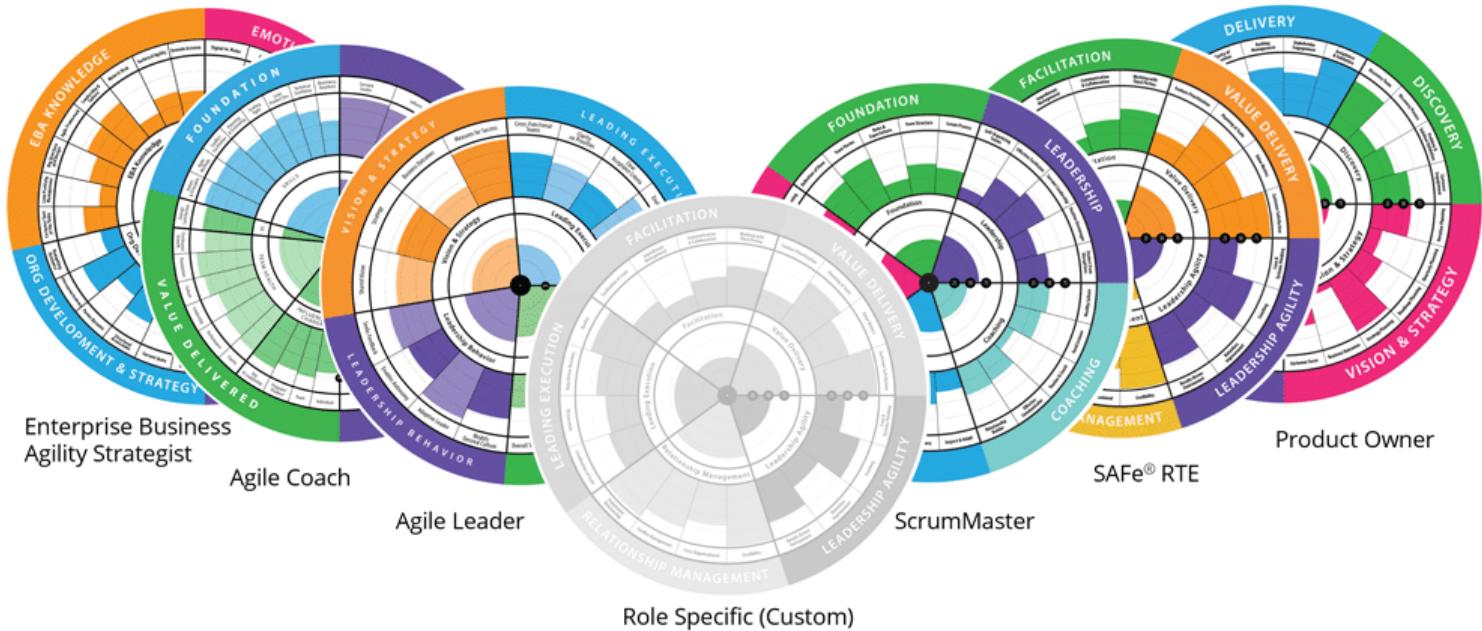
- House of Skills concepts
- 5 Patterns of Group Collaboration
- "Thinklets" used for gathering and processing information
- Various listening and questioning techniques used for maintaining the meeting process
- Various techniques for managing dysfunctional behavior
- Fist-of-Five for consensus gathering
- Managing and Resolving conflict techniques

INTERVIEW/FOCUS GROUPS

Many organizations are facing talent gaps and the need to accelerate the scale of developing new roles and re-skilling existing team members in new practices and ways of working. Using the AgilityInsights® platform, organizations can understand the current state of employee skill sets and design career learning plans and pathways. Additionally, when combined with a learning protocol, such as coaching and workshops, interviews or focus groups, AgilityInsights® can enable organizations in modern ways learning for your employees. This is achieved by following the general timeline:

1. **Role Deep Dive** - Learn about your role and expectations with a deep dive what's expected (2 hours)
2. **Self-Assessment** - Complete your self-assessment (15-30 minutes)
3. **360 feedback** (optional) - Invite others to complete 360 assessments (15-30 minutes)
4. **Growth Planning** - Review results with individuals and build learning plan; identify if help is needed from manager/leader (coach or peer to peer) (2 hours)
5. **Leadership readout preparation** - Coach/facilitator will roll up results and identify patterns (2 hours)
6. **Leadership readout** - Review program results with leaders, share insights (90 minutes)

Please see Attachment 3 for the entire Focus Group Protocol.



ENTERPRISE BUSINESS AGILITY COACHING & WORKSHOPS

We provide these in-person, online and consider them jump starts into the Agile way. They are fully customizable to every type of organization and its culture. Some examples of the EBA coaching and workshops follow.

Getting Started – Education & Awareness

Starting the Enterprise Business Agility journey always begins with education, awareness, and buy-in. Related coaching and workshops include:

- Enabling Enterprise Business Agility for Leaders (2 hours)
- Effective and Modern Product Management & Ownership (2 hours)
- EBA Strategist Certification Course (4 days)

Measurement & Strategy

This coaching and workshop delivers a baseline of your current EBA maturity and designs a strategy and roadmap for where to focus. Related coaching and workshops include:

- Enterprise Business Agility Baseline Assessment
- Enterprise Business Agility Strategy Session
- Measurement Jump Starts

Leadership Agility

Mature leadership agility by focusing on developing leaders at all levels and enabling new behaviors that support the new ways of working. Bring managers and team leaders on the journey of building high performing teams. Topics include:

- Leadership Agility
- Leading High Performing Teams
- Becoming an Effective Change Leader
- From Tactical to Strategic Leadership
- Effective Facilitation & Collaboration

AGILITYINSIGHTS® JUMPSTARTS

Offered in-person, remotely or online, AgilityInsights® Jumpstarts are designed to accelerate your enterprise maturity in specific areas within 12 weeks. These are packaged programs that we can customize for any audience. Here are just a couple relevant examples of these programs:

Transformative Leadership

Enables modern leadership skills across executives, senior leaders and middle managers that support and accelerate your organization's enterprise transformation.

Outcomes:

- Learn why organizations are transforming and the top 5 areas of change
- Understand Enterprise Business Agility and the capabilities needed to enable the flow of value across your enterprise
- Understand and articulate what modern leadership looks like
- Complete a baseline assessment of Leadership Agility and build a targeted individual growth plan
- Design a leadership learning roadmap with short modules offered every 2 weeks, monthly or quarterly
- Re-assess Leadership Agility for the target cohort every 6 months

Accelerate Talent Development

Accelerate and scale Talent Development through the LEARN > MEASURE > GROW > MENTOR program. Up-skill key roles and create a culture of continuous learning and mentorship.

Outcomes:

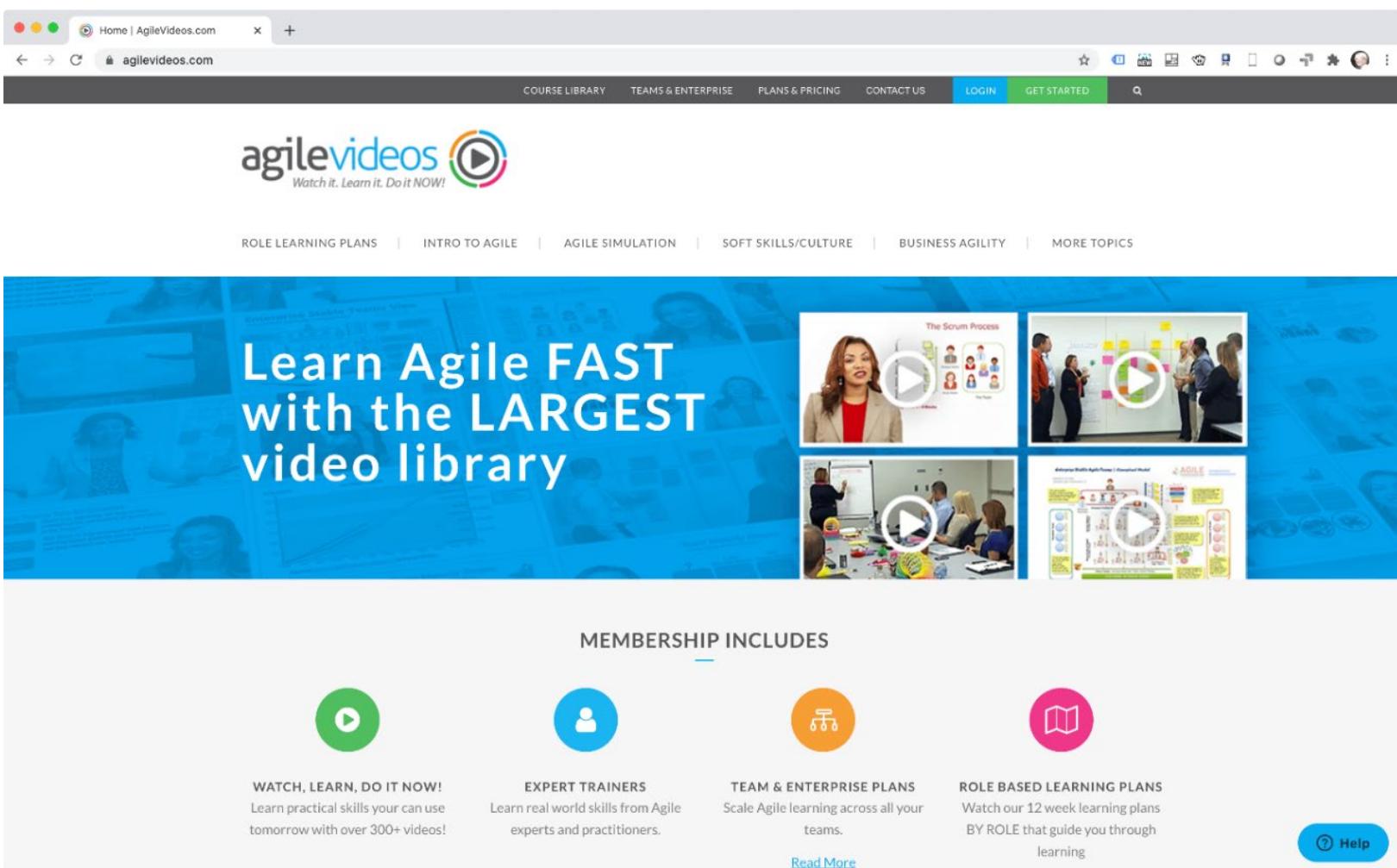
- Develop a scalable strategy for talent development across key roles
- Leverage existing radars or customize your own
- Deliver a role deep dive coaching and workshop which includes a role-based 360 assessment
- Build the Growth Portal with self-learning resources and recommendations for each competency
- Rollup of data across each role and development of management level improvement plans

COURSEWARE LICENSING & TRAIN THE TRAINER PROGRAM

We've done the hard work, so you don't have to. Courseware development is very time consuming, and we've spent years building and updating the content for this Enterprise Agility library. We now have a licensing program that can help you cut down development costs and time and give you a scalable solution for internal training. Included are:

- ➲ Over 30+ enterprise business agility courses available
- ➲ One-time fee for a perpetual (unlimited) license
- ➲ Fully customizable by you with internal relevant examples or terms
- ➲ Train the trainer program

- ⌚ Support and updates for 1-2 years



AGILITY UNIVERSITY VIDEO LEARNING

Agility University is the largest online video library designed to fast track Agile and enterprise agility learning across the enterprise. Training everyone in your organization can be difficult, but with Agile Videos your teams will learn modern Digital and Agile skills fast with 300+ short, practical, and engaging videos they can watch from anywhere, any time.

AGILITYINSIGHTS® CENTER OF EXCELLENCE PORTAL

The Growth Portal enables scalability and sustainability of the transformation by empowering teams/programs to access consistent guidance and recommendations related to each competency they want to improve.



AgilityHealth Growth Portal
Enabling Continous Growth & Learning
Welcome back, Sally!

TeamHealth > Foundation > Stability and Allocation

Stability and Allocation

Stability and allocation are measures of how 'focused' team members are on getting their work 'Done'.



Health

Dig deeper into what healthy and unhealthy look like. Explore what other competencies can impact (or be impacted by) this one.

Healthy

- A 'core' team of dedicated members are allocated effectively and stay together
- Work is brought to the teams instead of moving individuals to the work
- Team has planned effectively for different work classifications (i.e. strategic, operational, unplanned)
- Team feels they can focus on getting deliverables to 'Done'

Unhealthy

- Team members are allocated towards several other projects (multi-tasking)
- Team members are moved in and out of the team frequently for other priorities
- No 'core' team of dedicated team members exist which causes lack of focus
- General sense of churn; starting many deliverables but not finishing them

Impact

Cause	Effect
Manager	Predictable Delivery
Product Owner > Backlog Mgmt.	PO Confidence
Team Facilitator > Impediment Mgmt.	Quality
Planning > Short-Term, Mid-Term	

Interactive Teaching Approach

Here's a high-level look at some of the tools we use in no particular order:

- ⌚ activity blocks
- ⌚ case studies
- ⌚ challenging questions
- ⌚ collaboration.
- ⌚ dialogue simulations
- ⌚ Energizers
- ⌚ feedback loop
- ⌚ games
- ⌚ great spaces
- ⌚ group discussions
- ⌚ group work
- ⌚ Icebreakers
- ⌚ mock chats
- ⌚ polls
- ⌚ quizzes
- ⌚ real-world workplace problems
- ⌚ storytelling

Communication and Reporting

Prior to each learning session we have a standardized "pre-delivery" meeting in which we review the purpose of the coaching and workshop, who will be attending, any logistics for the coaching and workshop, and any known challenges for the participants that need to be addressed. Activities that happen during the coaching and workshop are all documented so that information can be shared with the participants and stakeholders (if needed) after the session. After the completion of the session, a "post-delivery" recap is held, reviewing the evaluations from the participants, any next steps that were captured as part of the session, and any stakeholder feedback. Pre- and post-delivery sessions should be scheduled within two weeks of the coaching and workshop.

Quality Assurance Program

A key component of our Quality Assurance Program is the coaching and workshop evaluation form that is sent to each participant at the end of every coaching and workshop and training session. Results are consolidated and shared with the facilitator for improvement and with the stakeholder for feedback. We are able to incorporate custom feedback requirements into our evaluation form to ensure we are meeting the requirements of COTA.

We customize our inspection program to every client. At this time, we do not have a program to demonstrate. That will be created the first week post-award, and an inspector will be designated and introduced at that time.

AgilityInsights® will maintain all coaching and workshop evaluation forms, the consolidated feedback results and any other feedback received as part of the contract. This information will be shared with COTA as part of the quarterly review meetings or upon request.

AgilityInsights® will use its own platform, which is a third-party provider for many organizations around the globe to administer surveys as needed.

Service Support (KPI)

We believe that service and support should be as personal as possible, however, we recognize that people work at all times of the day, so we have established several ways to contact our company:

- For those engaged in personal coaching, they will have direct access to their coach through phone, email, text, WhatsApp, etc.
 - They will also be introduced to our SVP of Operations and Enablement, Dawn Thiem, and have her contact information in case of emergency.
- For our platform, we have two primary ways to report issues or ask questions – we have an online help center where you can create a help ticket or you can reach out to our team directly through email at support@agilityinsights.ai.
 - With either channel, you should get an acknowledgement of your submission within 15 minutes.
 - Depending on the severity of your issue, response times will vary. We can share our full SLA documentation should you choose to go forward with our organization.

Quality Assurance (KPI)

A key component of our Quality Assurance Program is the coaching evaluation form that is sent to each participant at the end of every coaching session. Results are consolidated and shared with the coach for improvement and with the executive for

feedback. We are able to incorporate custom feedback requirements into our evaluation form to ensure we are meeting the requirements of COTA.

We have a coaching assessment we use with our customers, where they can rate the efficacy of their coach on an annual basis and give them feedback on their performance. The assessment results are consolidated for the coaching team and shared with the program leaders so they can see the overall feedback given to the coaching team.

Participants will also have an ability to – in the rare instance of an issue – reach out to our SVP, Operations and Enablement, who leads our coaching team, to share feedback directly at any given time during the engagement.

Additionally, on multi-year engagements we meet with the sponsors on an annual basis to review the scope of the engagement, review any feedback received, and any changes requested to the strategy for the engagement.

Quality Control, Review, & Reporting

AgilityInsights® will maintain all coaching session evaluation forms, the consolidated feedback results and any other feedback received as part of the contract. This information will be shared with COTA as part of the quarterly review meetings or upon request so long as the information is not confidential in nature.

AgilityInsights® will use its own platform, which is a third-party provider for many organizations around the globe, to administer surveys and generate reports as needed.

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agilityinsights®
accelerating value realization

Transformation Jump Starts | Agility Platform | EBA | Why AgilityInsights | Resources | [Get Started](#)

Deliver on your strategic outcomes FASTER, BETTER with AGILITY

Build a culture of high performing teams and accelerate strategy execution with AgilityInsights

[WATCH VIDEO](#)



Enterprise Challenges with Transformative Solutions

SECTION 5: SOCIAL POLICIES & DATA SECURITY

AgilityInsights® Diversity Inclusion Plan

Agile Transformation, Inc. d/b/a AgilityInsights is a certified, minority, woman-owned business (WOSB) that is proud of their diversity status and the diversity within their organization. Over 75% of their team members are a part of a diversity classification.

As a small business, we support other small businesses and individual entrepreneurs through our partner program. Over 50% of our partners are small businesses. As a SaaS product provider and strategic consulting firm, we do not have a large number of vendors we engage in the normal course of business. When needs arise, we chose to work with small businesses as often as possible.

Inclusion Policy

AgilityInsights® is an extremely diversified company and as a dedicated practitioner of Diversity, Equity, Inclusion, Belonging and Justice (DEI/DEIB/JEDI), we are deeply committed to non-discrimination against humanity including but not limited to:

- Age
- Color and Colorism
- Disability
- Gender Identity or Expression (SOGIESC)
- Indigenous Peoples
- National Origin and Culture
- Nepotism
- Privilege and Power
- Race
- Religion
- Sex
- Sexual orientation (2SLGBTQ)
- Tribalism
- Veteran status

Environmental Policy

AgilityInsights® has moved to a paperless company, choosing to deliver our workshop materials digitally to our customers to reduce our paper consumption and carbon footprint. We have also chosen to move to a virtual office environment, allowing our team to reduce their own carbon footprint by working from home and managing their work in a streamlined environment.

Data Security

AgilityInsights® is SOC 2 Type 2 certified for both privacy and security. SOC 2, or System and Organization Controls 2, is a compliance framework developed by the American Institute of Certified Public Accountants (AICPA) to ensure that service organizations handle customer data securely.

Key areas include:

- **Infrastructure:** Physical and hardware components (networks, facilities, and equipment).
- **Software:** Operating software and programs (utilities, applications, and systems).
- **People:** Personnel involved in the management, security, governance, and operations.
- **Data:** Information (files, databases, transaction stream, and tables).

AgilityInsights® is also Federal Risk and Authorization Management Program (FedRAMP®) approved which provides a standardized approach to security authorizations for Cloud Service Offerings. We are finalizing sponsorship to complete our FedRAMP certification process.

Furthermore we affirm that non-public State of Ohio COTA-related data will be stored and remain in the U.S.

AgilityInsights Certifications

Grow your talent in measurement, continuous improvement and enterprise business agility strategy



Learn how to facilitate TeamHealth measure and grow workshops.



Learn how to rollup, analyze, present data and support leaders on removing obstacles.



Learn how master defining, aligning, measuring and achieving outcomes using OKRs



Learn how to assess and accelerate Enterprise Business Agility transformations.

ATTACHMENTS

(Uploaded Under Separate Cover ON COTA Procurement Portal)

[Attachment 1 – Cost/Pricing Proposal](#)

[Attachment 2 – AgilityInsights® W-9](#)

[Attachment 3 – Affidavit Regarding Delinquent Taxes](#)

[Attachment 4 – Affidavit Regarding Government-Wide Debarment & Suspension](#)

[Attachment 5 – Affidavit Regarding Non-Collusion](#)

[Attachment 6 – Affidavit Regarding Restrictions on Lobbying](#)

AFFIRMATIONS

AgilityInsights acknowledges and affirms in their entirety:

- Coaching_Scope_of_Work_-_2025_20250306133035_1565
- Notice_to_Vendors-_Solicitation_Note_20250306133053_9689
- Proposal_Submission-_Cost_Proposal_20250306133049_8617
- Proposal_Submission-_Proposal_Requirements_20250306133119_2790
- Amendment 1