

State of Washington
Office of Financial Management
One Washington
Organizational Change Management Service
OFM 18-2000
issued
January 23, 2019

Objective: To obtain **Organizational Change Management Services**

Minimum Qualification: The One Washington Program seeks a Bidder with experience in direct management of Organizational Change Management in support of statewide business and system transformations. Only Proposals where Bidders certify they have completed at least one engagement with direct management responsibility for Organizational Change Management supporting statewide business process transformation including an enterprise level system implementation which included ten or more departments or agencies in the last five years will be eligible for evaluation.

Key Dates: For full schedule, see Section 2.2 [*Schedule of Procurement Activities*](#)

1. Pre-proposal Conference (Optional): February 5, 2019
2. Bidder proposals due: February 22, 2019 no later than 3:30 p.m. local time, Olympia, WA

WEBS COMMODITY CODE: 958-16 Business Management Services; 958-23 Computer Management Services; 918-75 Management Consulting; 958-68 Support Services, Management

Bidders are solely responsible for accessing the Competitive Procurement (CP) documents via WEBS. Failure to obtain these documents via WEBS may result in a Bidder having incomplete, inaccurate or otherwise inadequate information for bidding.

The document(s) will be available in standard Microsoft Office and Adobe Acrobat formats. Bidders are solely responsible for:

- **Downloading this solicitation consisting of the CP, Appendices, and any related incorporated documents provided by the CP Coordinator.**
- **Downloading all Addenda, if any, to this CP to ensure receipt of all updates or revisions.**

WEBS notification via automated email of Addenda to the CP will only be provided to those Bidders who have registered with WEBS and **have downloaded the CP from WEBS**. Bidders must check their email spam filters to ensure receipt of WEBS email notifications are not being blocked.

ADA COMPLIANCE: The state complies with the Americans with Disabilities Act (ADA). **Bidders may contact the CP Coordinator to receive the CP documents in Braille or on tape.**

BIDDER ELIGIBILITY: This procurement is open to those bidders who satisfy the minimum qualifications stated herein.

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1 Introduction

The State of Washington, by and through the Office of Financial Management (OFM), is conducting this Competitive Procurement (CP) subject to chapter 39.26 Revised Code of Washington (RCW) Procurement of Goods and Services. The purpose of this CP is to obtain Organizational Change Management (OCM) Services and related best practices to manage the organizational changes necessary to support the efforts of the One Washington business transformation program.

OFM is seeking OCM Services to assist with the activities that will be required throughout the transformation envisioned by the One Washington Program (“One Washington” or “Program”).

The remainder of this section is intended to provide Bidders with background and contextual information needed to provide high quality proposals.

1.1 Washington State Government

One Washington is a state enterprise program that will impact multiple branches of government and the majority of agencies within the state, including those led by separately elected officials. This section outlines information on how Washington State government is organized.

Washington State has more than 110,000 full time equivalent employees across the three branches of government: executive, legislative, judicial, and higher education. A brief description of each branch is provided below:

Executive - includes the Governor and eight elected state officials:

- Lieutenant Governor
- Secretary of State
- State Treasurer
- Attorney General
- State Auditor
- Superintendent of Public Instruction
- Insurance Commissioner
- Commissioner of Public Lands

The Governor has the power to appoint heads of departments or agencies who are not led by an elected official, of which there are 36. Additionally, there are 40 agencies under the authority of a Board, Council or Commission.

Legislative - composed of the Senate and the House of Representatives and enacts bills into laws. The Senate has 49 elected members corresponding to the number of legislative districts in the state. The House has 98 elected members, two for each district.

Judicial - composed of the state courts: Trial Court (Municipal, District and Superior), Court of Appeals, and Supreme Court. State courts make rulings on the constitutionality and legality surrounding the implementation of a law, as passed by the Legislature and signed by the Governor. The Supreme Court is composed of a Chief Justice and eight Justices, each of which are elected to six-year terms by the public.

1.2 Office of Financial Management (OFM)

The Office of Financial Management (OFM) is a cabinet-level agency within the Executive Branch that provides vital information, fiscal services and policy support to the Governor, Legislature and state agencies in their efforts to serve the people of Washington State. In this role, OFM centrally develops and maintains state administrative and accounting policies and prepares statewide financial reports. OFM is accountable for providing enterprise financial systems and coordinating improvements in statewide financial processes. OFM has established “Better information. Better decisions. Better government. Better Washington.” as their strategic vision. In 2013, recognizing that modernization of state practices and underlying technologies is of critical importance to providing better data and information, OFM established the One Washington Program in order to provide consistent focus, planning and execution to support enterprise business transformation efforts.

1.3 The One Washington Program

One Washington is a business transformation Program of the state of Washington. The Program is expanding organizational readiness activities to support the successful implementation of a cloud-based enterprise resource planning system (ERP). The ERP will provide functionality for the state’s four core administrative business systems: Finance, Procurement, Budget, and HR/Payroll services. This transformation will fundamentally alter how the state conducts business and is anticipated to have far-reaching impacts for years to come.

Expanded organizational readiness activities are necessary for a Program of this magnitude to address business, human resource and technical risks, as well as to prepare for a smooth ERP transition in future biennia, and to reap the benefits of transformation.

The state of Washington has not previously undertaken simultaneous modernization and transformation of its four core administrative business systems. This transformation is will

require more than merely adopting new technology or working with new processes. The transformation will extend to multiple tiers of the state organization. And, successful transformation is critical to business outcomes of the state enterprise on a daily and significant basis.

Beginning with the end-user perspective from within each of the four business functions, to mid-management, to data exchange with shadow processes and systems, there will be many people and components that must be identified and simultaneously supported in this transformation effort to achieve the goal of successfully modernizing the state's core business functions.

Where the state's valued human resources are concerned, there is a need to create an atmosphere that is open to and welcoming of transformation. This includes at the leadership level, where solidifying an understanding of the need for extra care and attention to management of the transformation is vital.

While One Washington is a business transformation effort, there are also technical elements that will require the Program to equally inform and engage information technology leaders and their teams.

The state seeks to 1) mitigate the significant risk of its employees not being aligned with the transformation, and 2) posture its employees to successfully complete the transformation and achieve sustained adoption of the new ERP.

In order to accomplish the state's goals, the state requires an organizational change management firm with demonstrated experience, expertise and thoughtfulness in enterprise-level, public sector transformation and ERP implementation. Additional information about One Washington can be found at <https://ofm.wa.gov/about/special-initiatives/one-washington>.

1.4 One Washington Activities

The following subsections provide Bidders with awareness of One Washington's current (2019-2021 biennium) and planned future activities.

One Washington is a business transformation Program of the state of Washington. The Program is expanding readiness activities to support the successful implementation of a cloud-based enterprise resource planning (ERP) system that will provide functionality for the state's four core administrative business systems: Finance, Procurement, Budget, and HR/Payroll services.

Readiness activities are critical for a transformation Program of this magnitude to address business, human resource and technical risks, to prepare for a smooth ERP transition in future biennia, and to reap the full benefits of this transformation.

This is the first time the state of Washington has undertaken simultaneous modernization and transformation of its four core administrative business systems. Transformation is not merely adopting new technology or working with new processes. Transformation is not limited to one tier of the organization. This transformation impacts all of state government and success is critical.

Beginning with the end-user perspective within each of the four business functions, to mid-management, to data exchange with shadow processes and systems, there will be many people and components that must be identified and simultaneously transformed to achieve the goal of modernizing the state's core business functions.

Where the state's valued human resources are concerned, there is a need to create a vertical atmosphere that is open to and welcoming of transformation, and at the leadership level to solidify understanding of the need for extra care and attention to managing the transformation.

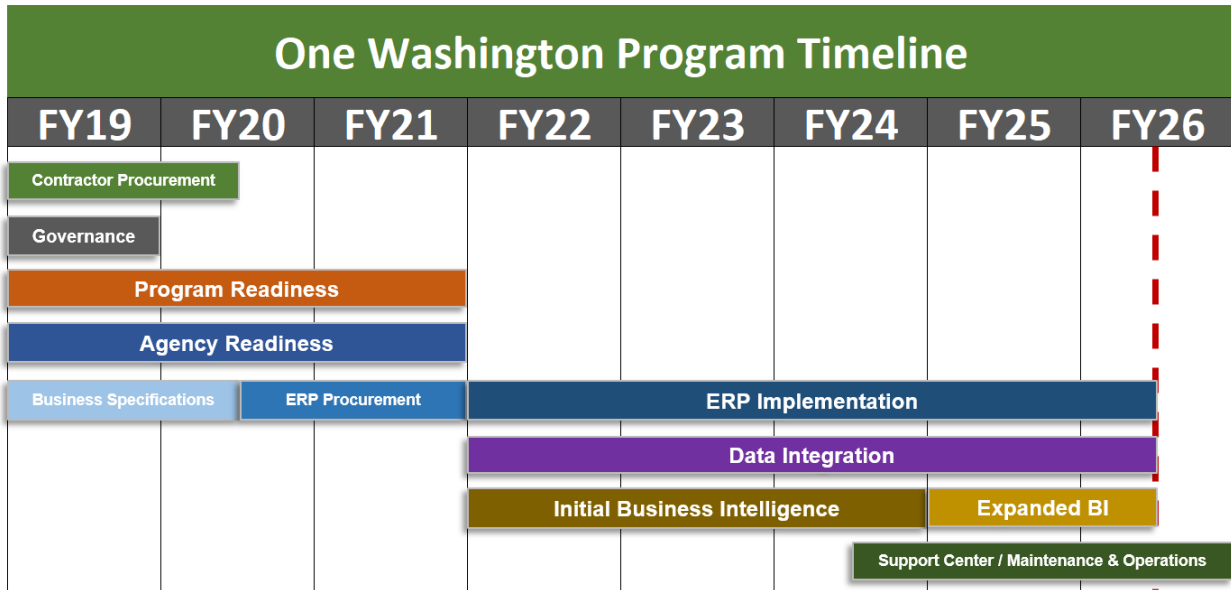
And, while One Washington is a business transformation effort, there are technical elements that will require the Program to equally inform, engage and transform information technology leaders and their teams.

The state seeks to 1) mitigate the significant risk of its employees not being aligned with the transformation, and 2) posture its employees to successfully complete the transformation and achieve sustained adoption of the new ERP.

In order to accomplish the state's goals, the state requires an organizational change management (OCM) firm with demonstrated experience, expertise and thoughtfulness in enterprise-level, public sector transformation and ERP implementation.

1.4.1 Future Planned Activities

One Washington has a proposed timeline of the business transformation efforts. The following graphic represents the timeline and vision for the program.



The following content provides additional information on the anticipated work streams outlined in the One Washington program schedule in order of relevance to the OCM Services.

Organizational Change Management

- Procure organizational change management services with ERP implementation experience:
 - Develop comprehensive change management plan
 - Baseline agency readiness assessment
 - Communications plan
 - Stakeholder engagement plan
 - Resistance plan
 - Training plan
 - Agency change management pool
 - Document current agency processes
 - Benchmarking

Program Readiness

- Build capability for program:
 - Fully staff the Program Management Office
 - Add the following technical expertise:
 - Chief Technology Officer
 - Chief Information Security Officer
 - Consultant support in specialized technical areas

- Implement model office
- Develop information technology and business operating models

Agency Readiness

- Continue with more in-depth technology readiness activities:
 - Complete a comprehensive data gathering initiative
 - Update integration plan
 - Ensure complete inventory of agency systems and integrations

Develop SaaS Plus procurement:

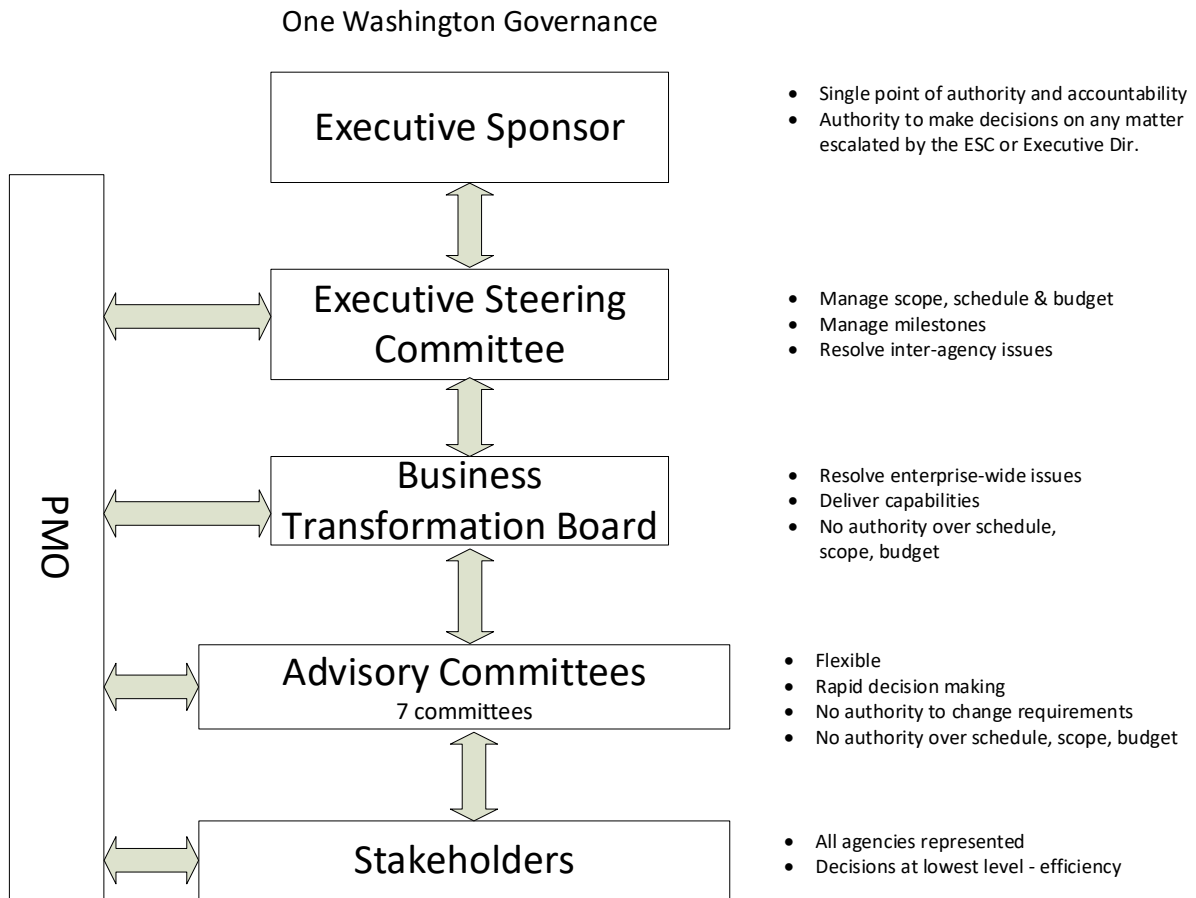
- Expand scope of procurement to include Budget and HR/Payroll capabilities
- Procure specialized ERP procurement assistance
- Contract for an ERP expert
- Contract for a Special Assistant Attorney General

1.5 One Washington Governance

The One Washington Program is a business transformation program with a governance structure that supports:

1. Timely Decisions
2. Appropriate Stakeholder Involvement
3. Decisions Made at Lowest Level
4. High Level Support for Scope, Schedule & Budget
5. Provide Avenue for Leadership Decisions

The governance structure is detailed below with multiple levels to support effective decision making and a successful transformation of the enterprise business processes.



Approved October 2018

The Executive Steering Committee (ESC) articulates a vision for the program across the enterprise. Its role is to ensure that business expectations are clearly understood by all stakeholders and that the program direction aligns with business priorities. The ESC is comprised of leadership from agencies across the enterprise. The State of Washington recognizes that effective governance is key to success for any business transformation effort.

The ESC is a collaborative body that:

- has authority to make decisions on matters escalated by the Executive Director, Business Transformation Board, Program Director, or Project Management Office
- approves Program Charter and performance measures
- resolves risks and issues that impact ESC Program Performance Measures affecting scope, schedule, and budget
- provides guidance to ensure alignment with strategic objectives
- provides leadership in enforcing, carrying out, and/or communicating decisions

The Business Transformation Board makes decisions that do not affect scope, schedule and budget of the Program.

Business Transformation Board (BTB):

- is authorized to make decisions on matters escalated by the PMO or Program Director
- approves project related issues regarding delivery of enterprise business and functional capabilities to program stakeholders not affecting schedule, scope or budget
- provides guidance to ensure delivery of technical requirements and business capabilities meet the expectations of program stakeholders
- provides leadership in enforcing, carrying out, and/or communicating decisions

There are seven Advisory Committees that support each of the seven functional areas of the Program; Finance, Procurement, Budget, Human Resources, Change Management, Technical, and Data Governance.

Program Advisory Committees:

- Seven committees are chartered to provide:
 - direction and decision making in support of stakeholder requests within their authority
 - authorized to make decisions on matters escalated by the PMO
 - provides flexibility in more rapid decision making
- No authority over scope, schedule, budget

This multi-level governance structure will provide opportunity for agency input, participation from experts across the enterprise in guiding the Program, and an effective way to make timely decisions to keep the Program moving forward.

Other Program Oversight:

- One Washington is under the oversight of the Office of the Chief Information Officer (OCIO).
- The Deputy Director at OFM is the Executive Sponsor. As champion for the business modernization and transformation effort, the Executive Sponsor is responsible for clearing barriers and resolving issues of scope, schedule, budget or quality that the Program Executive Director and team are unable to resolve.
- The One Washington Executive Director has executive level oversight of the Program and is accountable for the achievement of Program outcomes. The Executive Director is responsible for stakeholder management and budgetary accountability.
- Program Director is responsible for the operational oversight of the Program and is the first level of escalation for decision making when issues arise that the Project Manager and team are unable to resolve.

- The One Washington Program has a contracted Project Management Office (PMO) that has oversight for the Program’s day-to-day execution.
- The One Washington Program has contracted Quality Assurance (QA) oversight as well.

1.6 Legacy Systems and Process Environment

Washington currently relies on a number of aging information systems that limit the state’s ability to transform and modernize business operations. Using Lean techniques is minimally effective because the base technology is old, inflexible and limiting. These older systems do not meet modern expectations for access to accurate and timely data, decision support and transparency. Additionally, integration with other systems is costly and difficult. The lack of modern functionality in these legacy systems leads to data and process duplication across state government as agencies have been required to meet these needs on their own. The One Washington Program seeks to address these issues through business process transformation supported by the replacement of core legacy systems.

Accounting. There are two primary legacy systems supporting the financial business process. These include the state’s central financial system, AFRS, which was implemented in 1984; and the Department of Transportation’s financial system, TRAINS, which was implemented in 1991.

AFRS is a mainframe accounting system that provides accounting support for all Washington State Agencies including cabinet level agencies, separately elected entities and higher education institutions. AFRS is Washington State’s central accounting system for recording revenues, expenditures, receipts, disbursements, staffing, and allotments. AFRS is the official book of record for Washington State. AFRS is a customized version of the KPMG R*STARS software package that was installed more than 35 years ago and has been customized to meet the unique needs of Washington State. Data from AFRS, once processed, is loaded into a structured query language (SQL) data warehouse to support statewide financial reporting and processes.

TRAINS is a mainframe accounting system that provides accounting support for all of WSDOT’s revenues, expenditures, receipts, disbursements, resources, and obligations. It is a highly customized version of an American Management Systems (AMS, now CGI) software package. TRAINS is used as WSDOT’s primary financial system and is unique in the state for that reason. Data from TRAINS, once processed, is sent to AFRS at an aggregate level to support statewide financial processes. The TRAINS application also includes the current WSDOT budgeting system known as the Transportation Allotment and allocation Control System (TRACS) that will be included in Budgeting system described below.

Budgeting. Beyond Finance, the state has additional information technology systems supporting other administrative functions. The statewide budget development process is supported by a collection of agency and enterprise systems. Departments or agencies use

their own process and systems, such as TRACS within WSDOT, to develop their individual budgets. Last year OFM replaced the fragile Budget Development System (BDS) for operating budgets with an Agency Budget System (ABS), which will provide a stable environment until the One Washington solution can be implemented. The OFM budget development applications also contain seven modules upgraded between December 2015 and December 2016, replacing applications implemented in the mid-1990s. However, all of these modules remain separate applications, requiring extensive integrations and reconciliation of data. Significant budget process transformation is anticipated with the implementation of a modern budgeting solution.

Procurement. Washington's enterprise procurement processes are not supported by an end-to-end information technology system. Rather, these processes are currently supported by a number of disparate systems with limited information being shared between the systems. As a result, the state has significant diversity in their procurement processes and significant limitations in reporting on spending and procurement related activities and functions. The lack of system infrastructure requires state agencies to use manual processes for vendor management, procure-to-pay and inventory management which ultimately limits the productivity of the staff completing these processes.

Human Resources. In the human resources domain, Washington uses an instance of SAP's Human Capital Management referred to as the Human Resource Management System (HRMS) to support personnel administration and payroll. Limited functionality beyond payroll and core human resource management has been implemented in the SAP product. When HRMS was implemented in 2006, substantial customizations were made to SAP software, making the support and upgrade path more difficult and expensive. From this experience, One Washington has identified the need to limit customizations in future One Washington transformations.

In addition to the systems described above, there are additional state systems that integrate with or replicate the functions of AFRS. Many of these systems were implemented in the 1980s or 1990s and are joined together using a combination of aging technology, out-of-date computer coding and cumbersome manual efforts conducted by state employees. As a result, the State struggles to effectively pull together data on state resources and combine it into meaningful information for decision makers to use to guide and manage activities.

Washington's systems infrastructure is complex, fragile, and requires the constant monitoring by information technology staff. For the most part, only mandated changes are made to any legacy system in order to maintain system stability. As a result of the inability to easily make system changes, "workarounds" are necessary to keep pace with changing rules and procedures and state staff utilize numerous spreadsheets and desktop databases to verify and track transactions and costs. These offline systems and processes lead to duplicate sources of data that may contain potentially conflicting information.

In addition, there is diminishing expertise within the State in the mainframe computer languages used to build and maintain many of these applications. As a result, there is the potential for system failure if existing resources cannot keep up with the demands for application changes or if they are not available to perform necessary production support activities.

1.7 Budget and Funding

Washington enacts budgets on a two-year cycle, beginning July 1 of each odd-numbered year. The biennial budget enacted by the Legislature can be modified in any legislative session through changes to the original appropriations. It is typical for the Legislature to enact annual revisions to the state’s biennial budget. These revisions are referred to as supplemental budgets. One Washington is expected to span multiple biennial budget cycles and it is currently envisioned that the Program projects and initiatives will be funded incrementally through a series of budget cycles.

2 Administrative Requirements

2.1 Competitive Procurement Coordinator (M)

The CP Coordinator is the sole point of contact for this solicitation. All communication regarding the subject of this OCM Service upon its release must be with the CP Coordinator, using the contact information set forth below.

Bidders are to rely only on written statements issued by the CP Coordinator. Any other communication will be considered unofficial and non-binding on the Agency. Communication about this CP directed to parties other than the CP Coordinator may result in disqualification of the Bidder.

Name	Rebecca R. Riley, CP Coordinator
E-Mail Address/ Subject Line Requirements	OFMBidProcurement@ofm.wa.gov To ensure proper delivery, all communications <i>must include</i> the following in the Subject Line: CP 18-2000 Change Management Services
Mailing Address	P.O. Box 43113, Olympia, WA 98504-3113
Physical Address for Delivery	302 Sid Snyder Ave. S.W., Third Floor, Olympia, WA 98504
Phone Number	(360) 902-7304

2.2 Schedule of Procurement Activities (M)

Provided below is the schedule of procurement activities for this CP.

OFM reserves the right to revise this schedule. Any such revision will be in writing with notification through WEBS. OFM will not be obligated to give such notification in any other manner.

Solicitation Schedule	Date
OFM issues Competitive Procurement	January 23, 2019
Questions: Bidder may submit written questions until 3:30 pm local time, Olympia, WA	January 30, 2019
OFM will issue written responses to Questions	February 5, 2019
Bidder pre-proposal conference (Optional attendance) TIME: 3:00p.m. to 4:30 p.m. local time, Olympia, WA LOCATION: Room G015 B Helen Sommers Building 106 11th Ave SW, Olympia, WA 98501	February 5, 2019
Last day for Complaints – 3:30 pm local time Olympia, WA	February 14, 2019
PROPOSALS DUE by 3:30 p.m. local time, Olympia, WA	February 22, 2019
Evaluation of Proposals Begins	
<u>Phase 1</u> and <u>Phase 2</u> Evaluation	February 25, 2019 through March 5, 2019
<u>Phase 3</u> Evaluation Invitations Sent	March 6, 2019
<u>Phase 3 LOGISTICS</u> – time for bidders to arrange travel/OFM to coordinate evaluators, etc.	March 7, 2019 Through March 18, 2019
<u>Phase 3</u> Onsite Presentations/Interviews	March 19, 2019 March 21 and March 22, 2019
<u>Phase 3</u> Firm and Key Staff Reference Checks	March 25, 2019 through March 27, 2019

<u>Phase 3</u> ASB Recommendation for Phase 4 Interview/Selection	March 28, 2019
<u>Phase 4</u> Invitation sent/LOGISTICS	March 29, 2019 Through April 3, 2019
<u>Phase 4</u> Final Interview/Selection of Apparently Successful Bidder	April 4, 2019
Notice to Bidders	
OFM notifies Apparently Successful Bidder and begins contract negotiations	April 5, 2019
OFM notifies unsuccessful Bidders	April 5, 2019
Unsuccessful Bidders may request Debriefing until 3:30 local time, Olympia, WA	April 10, 2019
OFM holds debriefing conferences, if requested	April 15, 2019 through April 16, 2019
Estimated start date of contract	July 1, 2019

2.3 Revisions to the Competitive Procurement

OFM reserves the right to change this CP at any time. OFM may correct s in the procurement document identified by OFM or Bidders. Any changes or corrections will be by one or more written addenda attached to or incorporated in and made a part of this CP. All changes must be authorized and issued in writing by the CP Coordinator. In the event that it is necessary to revise or correct any portion of the CP, an addendum will be posted to Washington’s Electronic Business Solutions (WEBS) system.

If there is any conflict between addenda, or between an addendum and the CP, whichever document was issued last in time will be controlling.

OFM also reserves the right to cancel or reissue this CP in whole or in part, prior to the execution of a contract.

2.4 Bidder Questions and Answers

Early submission of questions is encouraged. During the CP process, Bidders will have an opportunity to ask clarifying questions and receive answers. Bidders may use e-mail or US mail to deliver written questions to the CP Coordinator. Questions will be accepted until the dates set forth in the *Section 2.2 [Schedule of Procurement Activities](#)*. One Washington will strive to respond to questions prior to the pre-proposal conference. However, if the volume or complexity of questions exceeds the Program’s ability to respond, unanswered questions may be addressed during the pre-proposal conference and responded to in writing as soon as

practicable thereafter. Bidders may only rely on written statements issued by the CP Coordinator. Any oral communications are unofficial and are not binding on OFM.

2.5 Complaints

The complaints procedure is available to Bidders who are contemplating submitting a Proposal in response to this CP. Only complaints concerning the following subjects will be considered:

- 1) A claim that the solicitation unnecessarily restricts competition;
- 2) A claim that the solicitation evaluation or scoring process is unfair or flawed; or
- 3) A claim that the solicitation requirements are inadequate or insufficient to prepare a response.

Bidders submitting complaints about this procurement must follow the procedures described below. Complaints that do not follow these procedures will not be considered. If a Bidder submits a complaint against this solicitation, the Agency response will be considered the final disposition and the complaint cannot be raised again during the protest period.

All complaints must be in writing and signed by the complaining party or an authorized agent. The complaint must be sent to the CP Coordinator, or designee, at least five (5) Business Days before the Proposal due date and must clearly articulate the basis for the complaint. The Bidder submitting the complaint must also include a proposed remedy. Upon receipt of a complaint, a complaint review will be held by OFM. The OFM CP Coordinator will respond to complaints in writing, and the OFM Director will be notified of all complaints and provided a copy of OFM's response. A copy of the response to the complaint, including any changes to the solicitation, will also be posted to WEBS.

The complaint process does not include an appeal process.

2.6 Costs to Participate in the Competitive Process

OFM will not be liable for any costs incurred by the Bidder in preparation of a Proposal submitted or participation in any phase of the evaluation process described in this CP including, but not limited to, activities that require the Bidder to be on-site at OFM's location.

2.7 Responsiveness

All Proposals will be reviewed by the CP Coordinator to determine compliance with administrative requirements and instructions specified in this CP. The Bidder is hereby specifically notified that failure to comply with any part of the CP may result in rejection of the Proposal as non-responsive.

OFM reserves the right, however, to waive minor administrative irregularities.

2.8 No Obligation to Contract

OFM reserves the right to refrain from Contracting with any and all Bidders. Neither the release of this procurement document nor the execution of a resulting Contract obligates OFM to make any purchases.

2.9 Rejection of Proposals

OFM reserves the right at its sole discretion to reject any or all Proposals received without penalty and to not issue a contract as a result of this CP.

2.10 Withdrawal of Proposal

Bidders may withdraw a Proposal that has been submitted at any time up to the due date and time for such Proposal, identified in *Section 2.2: [Schedule of Procurement Activities](#)*. To accomplish Proposal withdrawal, a written request signed by an authorized representative of Bidder must be submitted to the CP Coordinator. After withdrawing a previously submitted Proposal, Bidder may submit another Proposal at any time up to the CP submission deadline.

2.11 Proprietary Information/Public Disclosure

OFM is subject to chapter [42.56 RCW](#), Public Records Act. Proposals submitted in response to this Competitive Procurement will become the property of OFM. All Proposals received will remain confidential until the Apparently Successful Bidder is announced. Thereafter the Proposals will be deemed public records as defined in chapter [42.56 RCW](#).

Any information in the Proposal that the Bidder claims as proprietary and exempt from disclosure under the provisions of chapter [42.56 RCW](#), or other state or federal law must be clearly designated. The information must be clearly identified and the particular exemption from disclosure upon which the Bidder is making the claim must be cited. Each page containing the information claimed to be exempt from disclosure must be clearly identified by the words "Proprietary Information" printed on the lower right hand corner of the page. Bidder must identify sections or pages claimed as proprietary in its Letter of Submittal (see *Section 2.12 [Letter of Submittal \(M\)](#)*).

Marking the entire Proposal exempt from disclosure or as Proprietary Information will not be honored. Bidder cannot restrict its entire Proposal or entire sections of the Proposal from disclosure. Bidder cannot restrict its pricing from disclosure.

Any attempts to restrict disclosure through use of footers on every page and/or global statements restricting disclosure will not be honored and may subject the Bidder to disqualification. OFM will maintain the confidentiality of all information marked Proprietary Information to the extent consistent with the Public Records Act. If a public records request is made for the information that the Bidder claims as proprietary and exempt, OFM will notify the Bidder of the request and of the date that the records will be released to the

requester unless the Bidder obtains a court order enjoining that disclosure. If a Bidder obtains a court order from a court of competent jurisdiction enjoining disclosure pursuant to chapter 42.56 RCW, or other state or federal law that provides for nondisclosure, OFM will maintain the confidentiality of the Bidder's information per the court order. If the Bidder fails to obtain the court order enjoining disclosure, OFM will release the requested information on the date specified.

OFM's sole responsibility will be limited to maintaining Bidder's identified Proprietary Information in a secure area and to notify Bidder of any request(s) for disclosure for so long as OFM retains Bidder's information in OFM's records. Failure to so label such materials or failure to timely respond after notice of request for public disclosure has been given will be deemed a waiver by Bidder of any claim that such materials are exempt from disclosure.

2.12 Letter of Submittal (M)

Bidders must include a Letter of Submittal on Bidder's official business letterhead, signed by a person authorized to bind Bidder's organization to a contract. The Letter of Submittal must be the first page of the hard copy of Bidder's Proposal and must contain the following information:

- a) Name, address, principal place of business, telephone number, and e-mail address of the legal entity or individual with whom contract would be written.
- b) Bidder's primary contact name, address, email address, and telephone number(s).
- c) A statement substantiating that the person who signs the letter is authorized to contractually bind the Bidder's organization.
- d) Sign and attach Appendix A of this CP, [*Bidder Certifications and Assurances Form*](#)
- e) Disclose whether or not any of proposed Bidder or Subcontractor staff were employed by the State of Washington during the past 24 months, or are currently a Washington State employee. See Section 2.16 [*Current or Former State Employees*](#).
- f) Disclose whether the Bidder or any Subcontractor has contracted with the state of Washington during the past 24 months. See Section 2.17 [*Prior State Contracts*](#).
- g) Identify sections or pages of Bidders Proposal claimed as proprietary. See Section 2.17 [*Proprietary Information/Public Disclosure*](#).
- h) State whether or not the Bidder has had a contract terminated for default in the last five (5) years. See Section 2.19 [*Prior Contract Performance*](#).
- i) Include a statement indicating whether the Bidder and/or any of its proposed subcontractors meet the definition of Washington Small Business or Veteran Owned Business. See. Section 2.20 [*Diversity Participation-Small Business and Veteran-Owned Business Participation Goals*](#).

By submitting this letter, Bidder accepts the procedure, review criteria the administrative instructions and other terms and conditions of the CP.

2.13 Bidder Certification and Assurances Form (M)

Bidders must submit a completed Bidder Certification and Assurances Form, Appendix A of this CP. Bidder must sign and include the Bidder Certification and Assurances Form, Appendix A, with its [*Letter of Submittal*](#).

2.14 Structure of Contract

To support effective contract management One Washington will structure the Contract as set forth in this section.

2.14.1 Umbrella Contract

The Umbrella Contract will contain the basic contractual Terms and Conditions (Ts&Cs) between the parties. Specific work will be documented in written Statement(s) of Work (SOW) executed between the parties as needed.

The Umbrella Contract will include an initial two (2) year term. The Contract may be extended by amendment, for up to two (2) additional two (2) year terms in whatever time increments OFM deems appropriate, depending on funding and the nature of the One Washington work to be performed. While it is estimated that the work of the One Washington Program will be completed in fiscal year 2026, if the work takes longer, the Contract resulting from this competitive procurement may be extended in up to two (2) year increments as needed to complete the work, at the State's sole option.

The initial term of the Umbrella Contract is expected to commence on or about July 1, 2019 when funding is expected to become available. In the event that funding becomes available at an earlier date, and at OFMs sole option, the initial term may commence prior to July 1, 2019. In that case, the initial term will be two (2) years plus the amount of time prior to July 1, 2019 that is supported by the additional funding.

2.14.2 Statements of Work

Statements of Work will exist under the framework of the Umbrella Contract and will serve as the Program's method for engaging the Bidder in discrete segments of OCM work. The State will retain decision making authority for work to be completed by the OCM Services firm. Statements of Work will contain timelines, deliverables and not to exceed pricing. Authorization for OCM Services will occur through SOWs as funding is provided. Statements of Work will be submitted by One Washington Program leadership to the OCM

Services firm who will provide a response to the scope requested. It is expected that for some SOWs, specific details will require negotiation between the parties.

Fees for services and activities provided by the OCM Services firm beyond the initial SOW will be negotiated based upon the agreed upon rate card.

For further information, please see the *Statement of Work Template* within the Sample Contract (Appendix B to this CP).

In order to maintain project momentum, the Bidder will be expected to respond to SOWs submitted to it by One Washington Program Leadership within five (5) Business Days or to request an alternative date for such response. As it is anticipated that the OCM Services firm will be aware of the One WA activities involved prior to the submission of the SOW, One Washington believes that short turnaround times are both possible and desirable to develop and finalize SOWs.

2.15 Holdback (M)

In order to ensure satisfactory performance for Deliverables described in specific SOWs executed from time to time with the OCM Services firm under the resultant Contract, OFM will withhold a 10% Holdback against each payment due the OCM Services firm for Deliverables.

Further, such Holdback will be carried forward across related SOWs when the outcome of work under separate SOWs is dependent on Deliverables from previous SOWs.

Dependencies between SOWs will be clearly articulated by the parties within the linked SOWs. This requirement may be waived at the OFM's sole discretion.

The Holdback will be paid in full upon satisfactory completion of relevant Deliverables, whether in a single SOW or across multiple SOWs with dependent outcomes. In the event that Deliverables are not satisfactorily completed, and upon proper notification and opportunity to cure by the OCM Services firm, the OFM has the right to permanently withhold retainage with no further responsibility or liability to the OCM Services firm. If funding for following related SOW's does not get approved or is withdrawn, OFM will release the holdback within 30 days of learning of such non-funding.

2.16 Sample Contract Response (M)

A Sample Contract has been included with this CP and is attached as Appendix B. This sample document will be the basis for the structure and content of the final contract negotiated between the ASB and the state. OFM may negotiate with one or more Bidders as part of Phase 4 of the evaluation process see *Section 5.1.4 [Phase 4: Selection of Apparently Successful Bidder](#)*. Bidder may not submit their own standard contract terms and conditions as a replacement to the sample contract or make OFM's acceptance of their Proposal contingent on such a substitution.

Bidder exceptions to the sample contract terms and conditions, additional or alternate terms and conditions must be submitted by Bidder with their Proposal by the Proposal due date. Bidder should review the Sample Contract attached in Appendix B and, using Appendix B, Attachment 1 - Proposed Contract Subjects, identify any concerns along with proposed alternate and/or additional terms and conditions the Bidder would like to identify. In addition, Bidder may use the track changes function in the sample contract document and submit the track changes version as a companion to *but not as a replacement of* Appendix B, Attachment 1.

2.17 Current or Former State Employees (M)

Specific restrictions apply to contracting with current or former state employees pursuant to chapter 42.52 RCW. Further, restrictions apply to former state employees who have retired from the State of Washington under the provisions of the 2008 Early Retirement Factors legislation Bidders should familiarize themselves with these requirements prior to submitting a proposal that includes current or former state employees.

Bidder must disclose within the Letter of Submittal whether or not any of proposed Bidder or Subcontractor staff were employed by the State of Washington during the past 24 months, or are currently a Washington State employee.

In response to this section, identify the individual(s) by name, the agency previously or currently employed by, job title or position held and separation date. If none, so state.

2.18 Prior State Contracts (M)

Bidder must disclose within the [*Letter of Submittal*](#) whether the Bidder or any Subcontractor has contracted with the state of Washington during the past 24 months. If yes, in response to this section, Bidder must provide the name of the agency, the contract number, project description and/or other information available to identify the contract.

2.19 Prior Contract Performance (M)

If the Bidder has had a contract terminated for default in the last five (5) years, indicate within the [*Letter of Submittal*](#) and describe such termination within the Bidder's response to this section. Termination for default is defined as: notice to stop performance due to the Bidder's non-performance or poor performance, and the issue was either (a) not litigated; or (b) litigated, and such litigation determined the Bidder to be in default.

Bidder must submit full details of all terminations for default including the other party's name, address, and phone number. The Bidder must describe the deficiencies in performance, and describe whether and how the deficiencies were remedied. Bidder must present any other information pertinent to its position on the matter.

The OFM will evaluate the facts and may, at its sole discretion, reject the Proposal on the grounds of the past contract performance if the information indicates that completion of a Contract resulting from this CP may be jeopardized by selection of the Bidder.

If no such termination for default has been experienced by the Bidder in the past five (5) years, so indicate in both the Letter of Transmittal and in response to this section.

2.20 Diversity Participation-Small Business and Veteran-Owned Business Participation Goals (M)

In accordance with the intent of RCW 39.26.005, the State encourages purchases of goods and services from State small businesses. State “small business”, “mini-business”, and “microbusiness” as defined in RCW 39.26.010 (22), (17), and (16) respectively.

In accordance with RCW 43.60A.200, the State encourages participation in all of its contracts from firms certified by the Washington State Department of Veterans’ Affairs (DVA). For information on these certified firms, Bidders may contact DVA at <http://www.dva.wa.gov/BusinessRegistry/>.

While participation in these programs is encouraged, no minimum level of participation will be required as a condition for receiving an award and Proposals will not be rejected or considered non-responsive on that basis.

In some cases, a Small Business as described above may also be certified by the Office of Minority and Women’s Business Enterprises (OMWBE) in accordance with chapter 39.19 RCW. For this CP, the State of Washington encourages participation by these firms. For information about these certified firms, Bidders may contact OMWBE at: <http://www.omwbe.wa.gov/>.

Bidders must identify in the Letter of Submittal if they, or any Subcontractors, meet the definitions and/or are certified as described above.

2.21 Incorporation of Documents into Contract

Bidders cannot treat the Proposal as a “marketing” document, as it will become part of the contractual commitment of the Bidder. Bidder’s subject matter experts, technical staff, and others, as appropriate, should be involved in preparing its Proposal to ensure that all information in the Bidder’s Proposal is accurate. Any disclaimer or other language contained in a Proposal that differs from these requirements will be disregarded by OFM and may result in the disqualification of Bidder.

2.22 Electronic Payment

The State requires the utilization of electronic payment in its transactions. The successful Bidder will be required to register in the Statewide Vendor Payment system, which is found at:

<http://des.wa.gov/services/ContractingPurchasing/Business/VendorPay/Pages/default.aspx>

Such registration must be completed prior to submitting a request for payment under a Contract resulting from this CP. No payment will be made until the registration is completed.

2.23 Insurance (M)

The Apparently Successful Bidder will be required to provide proof of Insurance at the commencement and during the term of the Contract.

Liability and Auto Insurance. OCM Services firm shall, at its sole cost and expense, obtain and, during the term of this Agreement, maintain, in full force and effect, the insurance coverage described in this section. OCM Services firm shall acquire such insurance from an insurance carrier or carriers licensed to conduct business in the State of Washington and having a rating of A-, Class VII or better, in the most recently published edition of Best's Reports. OCM Services firm shall include OFM, its boards, agencies, contractors, officers, employees, agents and volunteers as a named insured party in OCM Services firm's insurance policy obtained hereunder. If OCM Services firm fails to buy and maintain the insurance coverage described in this *Section 2.23 Insurance*, OFM may terminate the Contract under the termination provisions thereof. The minimum acceptable limits shall be as indicated below with no deductible except as indicated below:

Commercial General Liability covering the risks of bodily injury (including death), property damage and personal injury, including coverage for contractual liability, with a limit of not less than \$1 million per occurrence/\$2 million general aggregate. The policy shall include liability arising out of the parties' performance under this Agreement, including but not limited to, premises, operations, independent contractors, products-completed operations, personal injury, advertising injury, and liability assumed under an insured contract. OFM, its elected and appointed officials, agents, and employees of the state, shall be named as additional insureds;

Business Automobile Liability (owned, hired, or non-owned) covering the risks of bodily injury (including death) and property damage, including coverage for contractual liability, with a limit of not less than \$1 million per accident;

Employers Liability insurance covering the risks of OCM Services firm's employees' bodily injury by accident or disease with limits of not less than \$1 million per accident for bodily injury by accident and \$1 million per employee for bodily injury by disease;

Umbrella policy providing excess limits over the primary policies in an amount not less than \$5 million; Professional liability insurance is required if services delivered pursuant to this agreement, either directly or indirectly, involve or require providing professional services. Such coverage shall cover injury or loss resulting from OCM Services firm’s rendering or failing to render professional services. OCM Services firm shall maintain minimum limits no less than \$1,000,000 per incident, loss, or person, as applicable. If defense costs are paid within the limit of liability, OCM Services firm shall maintain limits of \$2,000,000 per incident, loss, or person, as applicable. If the policy contains a general aggregate or policy limit, it shall be at least two (2) times the incident, loss or person limit. If professional liability insurance is written on a “claims made” basis, the policy shall provide full coverage for prior acts or include a retroactive date that precedes the effective date of this contract. OCM Services firm agrees to disclose the existence and nature of any limiting endorsement that applies to any liability insurance policy purchased in accord with this contract. OCM Services firm is required to buy professional liability insurance for a period of twenty-four (24) months after completion of this contract. This requirement may be satisfied by the continuous purchase of commercial insurance or an extended reporting period; and Crime Coverage with a deductible not to exceed \$1 million and coverage of not less than \$35 million in the aggregate, which shall at a minimum cover occurrences falling in the following categories: Computer Fraud; Robbery; Safe Burglary; Forgery or Alteration; Money and Securities; Employee Dishonesty and Theft; and Theft, Disappearance and Destruction of Property. Crime Coverage shall include coverage for OCM Services firm employees working at OFM locations.

Industrial Insurance Coverage. Prior to performing work under this Agreement, OCM Services firm shall provide or purchase industrial insurance coverage for its employees, as may be required of an “employer” as defined in Title 51 RCW, and shall maintain full compliance with Title 51 RCW during the course of this Contract. OFM will not be responsible for payment of industrial insurance premiums or for any other claim or benefit for OCM Services firm, or any Subcontractor or employee or agent of OCM Services firm that may arise under the industrial insurance laws during the performance of duties and services under this Agreement. However, should OCM Services firm fail to secure insurance coverage or fail to pay premiums on behalf of its employees, OFM may deduct the amount of premiums owing from the amounts payable to OCM Services firm under this Agreement and transmit the same to the responsible State agency.

Subcontractors. OCM Services firm shall require all Subcontractors to have and provide evidence of insurance coverage with the following limits:

<u>Type of Insurance</u>	<u>Coverage Limits</u>
Workers’ Compensation	Statutory
Employer’s Liability	\$1,000,000 each occurrence

General Liability (bodily injury and property damage combined)	\$1,000,000 each occurrence/2M aggregate
Automobile Liability	\$1,000,000 each occurrence

In addition to these coverage limits applicable to all Subcontractors, any Subcontractor providing remote processing services for OCM Services firm shall provide cyber-liability coverage as follows:

\$5 million coverage for Cyber Extortion, Cyber Tism, and Privacy Liability, with a \$2 million sub-limit coverage for breach response cost and notification expenses.

Prior to subcontracting Services to any third party Subcontractor not listed in the Proposal, OCM Services firm shall obtain OFM' approval for such third party pursuant to Contract terms and conditions, including approval of such third party's insurance coverage which shall be included in these Subcontractor insurance requirements upon OFM approval (but only with respect to such approved Subcontractor). OCM Services firm shall maintain copies of Certificates of Insurance for each Subcontractor as evidence that each Subcontractor maintains insurance as required by the Agreement. Failure of Subcontractor(s) to comply with insurance requirements does not limit OCM Services firm's liability or responsibility.

Premiums. Premiums on all insurance policies shall be paid by OCM Services firm or its Subcontractors. Such insurance policies provided for OFM pursuant to this section shall expressly provide therein that OFM be named as additional insured, and that it shall not be revoked by the insurer until 30 days' notice of intended revocation thereof shall have first been given to OFM by OCM Services firm.

Cancellation. OCM Services firm's insurance policies shall not be canceled or non-renewed in scope of coverage without provision for equivalent substitute insurance and such cancellation or nonrenewal shall not take place or be reduced in scope of coverage until forty-five (45) days' written notice has been given to OFM, attention OFM One WA Executive Director, and OCM Services firm has replacement insurance policy(ies) in place that satisfy the requirements set forth in this *Section 2.23 Insurance* OCM Services firm's insurance policies shall not be reduced in scope without OFM's prior written consent.

Insurance Documents. OCM Services firm shall furnish to OFM copies of certificates of all required insurance within 30 days of the Effective Date, and copies of renewal certificates of all required insurance within 30 days after the renewal date. These certificates of insurance must expressly indicate compliance with each and every insurance requirement specified in this section. Failure to provide these documents shall be grounds for immediate termination or suspension of the Contract by OFM for material breach.

Increased Coverage. OFM is to be notified by OCM Services firm immediately if any aggregate insurance limit is exceeded. In such event, additional coverage must be purchased to meet requirements.

Subrogation. Except for instances of gross negligence or willful misconduct by OFM, OCM Services firm agrees to waive all rights of subrogation against OFM, its boards, agencies, departments, officers, employees, agents, and volunteers for losses arising from services performed by OCM Services firm under this Agreement.

Cross-Liability. All insurance provided by OCM Services firm shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the State and shall include a severability of interests (cross-liability) provision. This provision means all insurance policies shall include coverage for cross-liability and contain a “Separation of Insureds” provision.

Employees and Volunteers. Insurance required of OCM Services firm under the Agreement shall include coverage for the acts and omissions of OCM Services firm’s employees and volunteers.

General. By requiring insurance, the State and OFM do not represent that the coverage and limits specified will be adequate to protect OCM Services firm. Such coverage and limits shall not be construed to relieve OCM Services firm from liability in excess of the required coverage and limits, and shall not limit OCM Services firm’s liability under the indemnities and reimbursements granted to the State and OFM in this Agreement. All insurance provided in compliance with this Agreement shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the State.

2.24 Workers’ Compensation Coverage (M)

The successful Bidder must comply with all applicable workers’ compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable during the term of the Contract. The State will not be held responsible in any way for claims filed by the Bidder or their employees for services performed under the terms of the Contract resulting from this CP. A statement indicating the Bidder agrees to this requirement is sufficient.

2.25 Format of Proposals and Proposal Contents (M)

Proposal Submission Form and Format

The purpose of this section is to assist the Bidder in preparing a thorough Proposal and to support the evaluators in their ability to focus on the content of Bidder’s Proposals.

Required Format: MS Word and/or pdf

Proposals must provide information in the same order presented in this CP document with the same headings. Pages must be numbered consecutively within each section of the Proposal showing the Proposal section number and page number. Figures and tables must be numbered and referenced in the text of the Proposal by that same number.

Bidder Proposals must be delivered in separate submissions as follows:

- One (1) hard copy of the Letter of Submittal and signed Certifications and Assurances (Appendix A to this CP);
- One (1) electronic copy (via e-mail) of the response to:
 - 1) Administrative Requirements, including the Letter of Submittal and signed Certifications and Assurances (Appendix A to this CP); and
 - 2) OCM Services Requirements Response.
- One (1) electronic copy (via e-mail) of the Price Proposal that includes:
 - 1) Statement of Work 1- OCM Services Consultants; and
 - 2) Rate Card using the response template in Appendix G, Rate Card Response Template.

Numbering: Number each response so that it corresponds to the numbering in this CP.

Response to Each Requirement: Bidders must respond to each section/question separately.

Referencing another section for the response will not suffice, each response must stand alone.

Attachments to the Bidder Proposal: Attachments must be clearly labeled with the requirement number to which it corresponds.

Additional Non-responsive Information or Documents: Bidders should provide only the information requested. Additional information or documents submitted as part of the Bidder's Proposal that are not responsive to the requirement(s) will not be considered.

CP Requirements Response. Each of the CP requirements are numbered and/or titled. Each response requirement has a designation indicating how the response will be evaluated. The designations below are used throughout the CP. The Bidder is expected to respond as indicated for each requirement.

“Mandatory” or “(M)” means the Bidder must provide a response that will be evaluated on a pass or fail basis. The response must indicate explicitly whether or not the Bidder or its proposed Subcontractor meets the requirement and provide all information requested. A statement, “(Bidder Name) has read, understands, and fully complies with this requirement” is acceptable, along with any additional information requested.

“Mandatory/Score” or “(MS)” means the Bidder must respond to the requirement and the Bidder's response will be evaluated as described in *Section 5 Evaluation and Contract Award*. The response must always indicate explicitly whether or not the Bidder, its Subcontractor, or its proposed solution meets the requirement, and describe how the requirement will be satisfied.

“Mandatory/SCOR” or “(MSCOR)” means the Vendor must respond to the requirement and the Vendor's response will be evaluated using a Strengths, Challenges, Opportunities, and Risks (SCOR) Analysis as described in *Section 5: [Evaluation and](#)*

[Contract Award](#). The response must always indicate explicitly whether or not the Vendor, its Subcontractor, or its proposed solution meets the requirement, and describe how the requirement will be satisfied.

Delivery of Proposal. The required hardcopy versions of Bidder's Letter of Submittal and signed Certifications and Assurances must be delivered to the CP Coordinator at the address set forth in the *Section 2.1 [Procurement Coordinator](#)*, no later than the date and time set forth in the *Section 2.2 [Schedule of Procurement Activities](#)*.

The required electronic versions of the Bidders Proposal must be submitted via e-mail to the CP Coordinator e-mail address set forth in *Section 2.1 [Procurement Coordinator](#)* no later than the date and time set forth in the *Section 2.2 [Schedule of Procurement Activities](#)*. To ensure proper delivery, all communications *must include* the following in the subject line:

CP 18-2000 Change Management Services_ [plus specific title for each separate document submitted]

Bidder is solely responsible for timely delivery of its Proposal and for any delay in the delivery of their Proposal. OFM does not assume responsibility for any problems in the email or other delivery methods.

Late Proposals will not be evaluated and will be automatically disqualified from further consideration. All Proposals and any accompanying documentation become the property of OFM and will not be returned.

“Zipped” attachment files are **not** accepted by OFM e-mail security, and are **not** acceptable formats for Bidder's Proposal documents.

3 Scope of Work

OFM is seeking OCM Services firm to assist with organizational change management activities that will be required throughout the transformation envisioned by the One Washington Program.

3.1 Responsibilities (M)

The OCM Services firm chosen as a result of this CP will be expected to complete all Statements of Work executed under the Contract. The OCM Services firm is expected to provide highly qualified, experienced and capable staff who have gained expertise from previous transformation efforts. The OCM Services firm will provide industry leading OCM-related information, insights, best practices and perspectives to One Washington leadership, Program stakeholders and subject matter experts.

3.2 State Expectations of OCM Services Firm Staffing (M)

Each Statement of Work (SOW) will define a unique scope of work that will require an associated staffing level. As SOWs are defined and negotiated, the state will approve OCM Services firm Key Staff and approve the overall staffing level. Any replacement Key Staff must have equivalent expertise and years of experience and will require prior approval by the state.

Continuity of staff is of critical importance to the success of the One Washington Program. It is expected that consistent long-term staffing by the OCM Services firm will be provided as part of SOW 1: OCM Services Consultants located in Appendix C.1. Additional detail about the State's expectations can be found in Appendix C.1, SOW 1: OCM Services Consultants.

It is expected that OCM Services Consultants will be collocated onsite in Olympia with the One Washington program team for a minimum of four (4) full Business Days per week during core business hours. Offsite resources may be considered if project savings can be achieved without reducing team productivity and effectiveness. Final staffing, including staff location decisions, will be made by the State and negotiated as part of the SOW process. Bidder rates must be inclusive of all underlying expenses: e.g. resource rate, travel, etc. Day-to-day expenses related to performance under the Contract resulting from this CP, including but not limited to, travel, lodging, meals, and incidentals will *not* be reimbursed unless incurred at the request of One Washington.

The State anticipates that services requested within a SOW may require the use of Subcontractors. In these situations, the OCM Services firm will manage and be accountable for all efforts of their Subcontractor(s).

3.3 Additional Expectations (M)

The OCM Services firm and its staff, whether employees or subcontractors, will be expected to adhere to the following:

- 1) Security – the OCM Services firm will be required to follow the security policies laid out in the State of Washington’s Office of the Chief Information Officer’s Policy 141 – Securing Information Technology Assets <https://ocio.wa.gov/policies/141-securing-information-technology-assets>.
- 2) Confidentiality – In performance of the Contract resulting from this CP, the OCM Services firm may have access to information that is considered confidential. The OCM Services firm will be expected to contractually agree to maintain such confidentiality as set forth in the Sample Contract attached to this CP as Appendix B, Sample Contract.
- 3) Cooperation with state-authorizing entities and other contracted parties. The work to be accomplished under the Contract will require coordination with, approval by or will be subject to policies and processes under authority separate from OFM. The OCM Services firm will be expected to cooperate in good faith and to the fullest extent to ensure the overall success of the One Washington initiatives. This may include coordination with other contracted parties who may be responsible for delivery of various related services or technical solutions, or other governmental entities who may have an oversight role for a specific initiative under the One Washington Program.

4 OCM Services Requirements

Proposal responses should be structured in the same order as the items below and responses should be labeled with the section/subsection number to indicate the item being addressed. Bidder Proposals must adhere to the page limitations defined within this section. Bidders are encouraged to be succinct and to the point. Bidder should limit unnecessary marketing or advertising, extensive art work, unusual printing or other materials not essential to the utility and clarity of its Proposal.

4.1 Minimum Qualifications of the OCM Services Firm (M)

The One Washington Program seeks a Bidder with experience in direct management of Organizational Change Management in support of statewide business and system transformations. Therefore, only Proposals where Bidders certify they have completed at least one engagement with direct management responsibility for Organizational Change Management supporting statewide business process transformation including an enterprise level system implementation which included ten or more departments or agencies in the last five years will be eligible for evaluation.

Bidders must certify that they meet this requirement by signing and returning Appendix A, Certifications and Assurances.

4.2 Organizational Change Management Expertise and Approach (MSCOR)

The information provided by the Bidder in its Proposal is intended to provide the State with information about the experience and expertise of the Bidder. Specifically, One Washington seeks an established Bidder with a proven track record of providing OCM Services supporting successful statewide business transformation projects. Bidder must be able to maintain a high level of collaboration and partnership across the state enterprise. One Washington also expects that the Bidder will bring seasoned practitioners and proven OCM methodologies, capabilities, and disciplines to the project. In addition to the scoring method indicated for each item under this Section 4.3, each item is also subject to the SCOR analysis described in *Section 5 Evaluations and Contract Award*.

4.2.1 Bidder Overview (M)

Provide a brief overview of the Bidder organization that **addresses each of the following items:**

- 1) Identify when the firm was established and provide a brief executive summary of the firm's history from establishment to the present.
- 2) A description of the OCM Services offered and industries served by the Bidder, with a focus on the areas identified in this CP.

Responses to this section should focus on the Bidder's experience in providing OCM Services supporting large-scale, public sector business transformation projects(s) comparable to the One Washington Program in terms of business changes and number of other organizations involved. If selected as the Apparently Successful Bidder (ASB) and upon the successful execution of the Umbrella Contract, the Bidder will be considered the Prime

Contractor to any Subcontractor(s) proposed by Bidder and allowed under the resultant Contract.

Limit response to no more than three (3) pages.

4.2.2 Subcontractor Overview (M)

OFM will accept Proposals that include Subcontractors only if Bidder acts as the Prime contractor to such Subcontractors. Bidder must state whether Subcontractors are or are not being proposed. If Subcontractors are being proposed, Bidder must list them in response to this subsection. OFM reserves the right to approve or reject any and all Subcontractors that Bidder proposes. Any Subcontractors engaged after award of the Contract must be pre-approved, in writing, by OFM.

Specific restrictions apply to contracting with current or former state employees or some retirees. See *Section 2.17: [Current or Former State Employees](#)*, above.

If the Bidder is proposing Subcontractors, provide a brief overview of each Subcontractor firm (if any) and its role by **providing the following:**

- 1) Identify when the firm was established and provide a brief executive summary of the firm's history from establishment to the present.
- 2) A description of the service lines offered and industries served by the Subcontractor, with a focus on the areas identified in this CP.
- 3) Identify which SOW the Subcontractor is proposed to support (see section 4.3.10 [Statements of Work Response](#)), the role the Subcontractor will have and the value they will provide.
- 4) List the projects where the Bidder and the Subcontractor have teamed together whether currently or in the past.
- 5) Describe the Subcontractor's experience in the public sector.

If at Contract award or any time thereafter, any specifically named individual(s) identified in the Bidder Proposal is not available, OFM has the right to approve or reject any change in Subcontractor personnel.

Limit response to no more than three (3) pages for each Subcontractor.

4.2.3 Public Sector Practice (MS)

One Washington believes that Bidder understanding of the complexity, nuances, and challenges of business transformation in the public sector is critical to the success of the Program. It is imperative that the OCM Services firm is able to support the multiple efforts over many years and across agencies both large and small. This will require the OCM Services firm to have the ability to scale staff support to One Washington's variable OCM needs over time. One Washington seeks to understand the breadth, depth and capacity of the Bidder's public sector practice.

Provide a brief overview of the Bidder's OCM public sector practice that **addresses each of the following items:**

- 1) Briefly describe the Bidder's OCM experience within the public sector with a focus on supporting OCM related to statewide business transformation and system implementation.
- 2) Provide a count of Bidder's current OCM Public Sector practitioners. For purposes of this statement, One Washington defines a Public Sector practitioner as an individual with U.S. experience in the following: local government, state government, higher education and federal government.
- 3) Describe the breadth, depth and capacity of the Bidder's public sector practice as it relates to the services described in this CP. Explain how this breadth, depth and capacity will benefit the One Washington Program.

Limit response to no more than three (3) pages.

4.2.4 Business Transformation Experience (MS)

The One Washington program is a transformative effort to modernize the State's business processes which is expected to result in the acquisition of technologies to support the transformed business processes. Transformation efforts of this magnitude are inherently difficult and complex. One Washington seeks an OCM Services firm with prior experience supporting public sector entities with the size and scope of the One Washington effort. Provide a description of the Bidder's experience and specific involvement in similar transformational efforts. At a minimum, **respond to each of the following items:**

- 1) Describe the client, the project, and the Bidder's role including the level of effort.
- 2) Discuss the critical success factors for each of the business transformation efforts listed and the Bidder's role in actively supporting these critical success factors.

Limit response to no more than three (3) pages.

4.2.5 Organizational Change Management Methodology (MS)

Provide a description of the Bidder's OCM methodology including, but not limited to **the items below:**

- 1) Describe the Bidder's OCM methodology and how it can be "rightsized" to activities and projects given the One Washington approach.
- 2) Discuss the Bidder's recommended communication approach.
- 3) Discuss how the Bidder would suggest dividing activities for the change effort between the Bidder staff, One Washington project staff and stakeholders.

Limit response to no more than three (3) pages.

4.2.6 Organizational Change Management Approach (MS)

One Washington seeks a Bidder that is able to execute a disciplined, repeatable OCM approach with demonstrated high quality and positive outcomes. The success of this approach will assist in preparing for the challenges inherent with the organizational changes resulting from transformation of the State's enterprise processes and systems. One Washington values a Bidder with an OCM approach that will successfully drive predictable and repeatable results tailored to support the One Washington efforts described in this CP.

Provide the Bidder's proposed OCM Services approach to support the business process and system transformation described within this CP **including, as a minimum:**

- 1) A description of the proposed OCM approach.
- 2) A discussion about the key elements required to provide predictable, repeatable and quality outcomes.
- 3) How this approach has benefited previous public sector OCM efforts.
- 4) How the approach will support the One Washington transformation efforts described in this CP.

Limit response to no more than five (5) pages.

4.2.7 Organizational Change Management Philosophy and Relationship Approach (MS)

One Washington is seeking an OCM Services firm with the culture and capability to successfully partner with the State in a long-term engagement as contemplated and described in this CP. Critical to the success of the Program will be continuity of OCM Services firm

staff and a desire to seek mutually beneficial resolutions to issues that may arise. The State values a Bidder with a demonstrable commitment to successful partnering and collaboration.

Describe the Bidder's approach and philosophy to relationship building. **Include the items below in your response:**

- 1) How the Bidder will approach an engagement with the State of Washington?
- 2) How the Bidder's culture supports the respective roles of the parties?
- 3) Describe the Bidder's views on the critical success factors and guiding principles that will yield success in building a highly functional relationship with the One Washington team.
- 4) Describe Bidder's experience working with clients in long-term engagements. Include a discussion of demonstrated experience working with clients in a mutually beneficial relationship to achieve intended outcomes despite changes in funding, setbacks, and delays.
- 5) Describe a relevant long-term project where the Bidder's relationship with the client was similar to what One Washington is seeking. Provide a concise description of the project that includes the items below:
 - a. Provide detail on the client's environment, objectives and the Bidder's contributions to the success of the project or program.
 - b. Identify challenges that were faced and how the parties worked through those challenges.
 - c. Describe the bidder's relationship philosophy and the keys to success that made the engagement a win-win for both parties.
 - d. Provide contact information for the client including contact name, title, phone number, and e-mail address. This information may be used to contact Bidder's client during Phase 3: Bidder Presentation/Interviews of the evaluation process.

Limit response to no more than eight (8) pages.

4.2.8 Staffing Approach (MS)

Bidder must be able to quickly and effectively provide staff who are qualified and experienced resources to meet the needs of the Program. This is a critical success factor for the Program. One Washington values a Bidder with a large pool of qualified employees and a broad subcontractor network who can provide the OCM services described in this CP.

During the negotiation of SOWs, Key Staff for each SOW will be defined. OFM must be consulted before the replacement of an individual designated as Key Staff. OFM will have the right to refuse the staffing of any resource proposed for a Key Staff role. Specific Key Staff positions or roles will be defined within individual Statements of Work. Resources proposed in response to SOW 1 - OCM Services Consultants will be designated as Key Staff.

Please provide a description of the Bidder's Staffing Approach, **including but not limited to the items below:**

- 1) A statement acknowledging and agreeing to the Key Staff provision above.
- 2) Describe how staff will be selected for Statements of Work.
- 3) Explain the Bidder's ability to respond with qualified individuals to a Statement of Work within five (5) Business Days of a request from One Washington.
- 4) Discuss how the Bidder will manage the timely resourcing of staff to provide OCM Services with the probability of multiple work streams requiring such services.
- 5) Describe the Bidder's subcontractor network and how it may be leveraged to support the needed expertise, skills and/or capabilities.
- 6) Describe considerations for determining whether a resource should be staffed on or off-site, recognizing that the final determination will rest with One Washington.

Limit response to no more than three (3) pages.

4.2.9 Statements of Work Response

One Washington hopes to begin work with the OCM Services firm promptly once funding becomes available. To that end, there are four Statement(s) of Work included as part of this procurement process. They are:

- 1) SOW 1 – OCM Services Consultants
- 2) SOW 2 – Organizational Change Management Plan
- 3) SOW 3 – Current Agency Business Processes
- 4) SOW 4 – Agency Change Management

Additional information for each SOW and the required Bidder response is provided in the sections below.

4.2.9.1 SOW 1 - OCM Services Consultants (MS)

Bidder must respond to SOW 1 as part of its response. SOW 1 addresses the participation of the OCM Services firm with the One Washington Program to design the OCM Program. There are five distinct deliverables in this SOW plus ongoing support from the OCM services firm which will require a monthly report of progress, risks and guidance to the Program. The six deliverables are:

1. Develop a measurement of quality metrics for Program performance.
2. Develop stakeholder feedback loops.
3. Develop a comprehensive OCM program.
4. Develop a measurement of, and preparation for, specific changes to the variety of state employee roles.
5. Develop a continuous improvement model with a schedule of check points.
6. Provide a monthly status report containing information for all of the Contractor's One Washington activities and responsibilities.

Throughout the period of performance under the contract regardless of the number, size or types of projects underway under separate SOWs, One Washington believes that having consistent and stable OCM Services firm staff described in SOW 1 is critical and is a fundamental element for ensuring the long term OCM success of Washington's transformation efforts. These individuals may participate in and lead activities under subsequent SOWs, but are expected to have a continual and consistent presence to support the One Washington strategy, and to be a conduit to other OCM Services firm resources and expertise.

Bidder must identify the individual project team members who will provide the services associated with Appendix C.1, Statement of Work 1- OCM Services Consultants. Provide current resumes for all staff proposed for this Statement of Work while limiting each resume to **no more than two (2) pages per person**. The same format must be used for all resumes and **include**:

- 1) Description of applicable experience, education and certifications.
- 2) Explanation of the individual's role within the Bidder's firm.
- 3) Length of employment with the Bidder.
- 4) Provide references from three previous or current clients for each of the proposed individuals using the Staff References Template located in Appendix F. This information will be used to contact the clients of the proposed staff during Phase 3: Bidder Interviews/Presentation of the evaluation process.

Bidder must complete the sample SOW 1, to include the methodology and approach for each deliverable under this SOW.

Bidder must provide no more than 3 examples of comprehensive OCM Programs they have assisted in implementing.

4.2.9.2 SOW 2 - Organizational Change Management Plan (MS)

Bidders must respond to SOW 2 as part of its response. The purpose of SOW 2 is to develop an integrated, comprehensive OCM plan based on proven methods and practices from other successful public sector ERP implementations and commensurately sized, enterprise-scale programs.

To respond to this section, Bidders must:

Include within Bidder's response, their methodology and approach for each of the minimum elements listed in SOW 2.

- 1) Baseline Readiness Assessment across the enterprise
- 2) OCM Framework
- 3) Communication Plan
- 4) Stakeholder Analysis and Engagement Plan
- 5) Consulting Plan
- 6) Resistance Management Plan
- 7) Training Plan
- 8) Final Comprehensive OCM Plan

Complete the template for SOW 2 located in Appendix C.2. Additional details and expected outcomes are included in the Appendix. Sections requiring completion are noted in red.

Bidder must include two examples of completed comprehensive OCM plans for projects of similar size.

4.2.9.3 SOW 3 - Current Agency Business Processes (MS)

Bidder must respond to SOW 3 as part of its response. The purpose of SOW 3 is to develop a methodology and provide tools and training to document current agency business processes across the State's four core administrative functional business areas: Finance, Procurement, Budget and HR/Payroll.

Bidders must:

Include their methodology and approach for developing, planning and executing a process to document current agency business processes within scope of the One Washington Program (Finance, Procurement, Budget, and HR/Payroll).

Complete the template for SOW 3 located in Appendix C.3. Additional details on SOW 3 and the expected outcomes are provided in the Appendix. Sections requiring completion are noted in red.

Bidder must include two examples of completed plans and studies where the OCM firm has assisted an entity with documenting current business processes in preparation for business transformation.

4.2.9.4 SOW 4 Agency Change Management (MS)

Bidder must respond to SOW 4 as part of its response. The purpose of SOW 4 is to support the creation of an OCM funding pool for stakeholder agency readiness and agency OCM activities for One Washington transformation during the 2019-21 biennium.

To respond to this section, Bidders must:

Include their methodology and approach to develop and guide the Program in the administration of an OCM funding pool for stakeholder agency readiness and OCM activities in support of agency-level transformation.

Complete the template for SOW 4 located in Appendix C.4. Additional details and expected outcomes are provided within the Appendix. Sections requiring completion are noted in red.

4.3 Pricing Proposal

One Washington intends to contract with a Bidder that meets the State's needs at the best value, but not necessarily at the least cost. This section discusses the cost proposal requirements of the CP document. One Washington will use this information, in part, to determine which firms to invite to Bidder Interviews/Presentations.

4.3.1 Statement of Work 1: OCM Services Consultants Pricing (MS)

In response to SOW 1, Bidders should review the requirements, skills, and level of effort expected by One Washington as outlined in *Section 4.2.9.1: [OCM Services Consultants](#)* and in SOW 1 located in Appendix C: Statement of Work 1. Bidder must propose fixed monthly rates that must not exceed the Bidder's proposed rates as provided in response to *Section 4.3.2: [Rate Card](#)*, but can be discounted. One Washington values bids that are economical

and that reflect the mutually beneficial nature of having a co-located presence over time with costs that are minimized in order to ensure consistent presence of OCM Services Consultants staff over the life of the Program.

To respond to this section, Bidders must complete Appendix C.1 and provide any suggested modifications to SOW 1 using the provided Word document with revision marks on. One Washington may take suggested revisions into consideration as part of contract negotiations but will not be obligated to accept them. If Bidder is suggesting no modifications to the SOW, so indicate within the response to this section.

4.3.2 Rate Card (MS)

One Washington seeks the submission of a uniform rate card as defined in *Appendix G: Rate Card Response Template* to allow the State to evaluate the pricing of responding Bidders. For the selected OCM Services firm, the agreed upon Rate Card will be used in the development of pricing for future Statements of Work and will provide predictable pricing for the duration of the Program. One Washington values Bidders that provide stable pricing at a competitive price point that will allow for the use of industry expertise as needed.

In populating the Rate Card, the **following requirements will apply:**

- 1) Rates must be *not to exceed* per experience level.
 - a. Rates must allow Bidder to staff specialized skills, onsite/offsite resources, etc.
 - b. Rates must be inclusive of all underlying expenses: e.g. resource rate, travel, etc. Day-to-day expenses related to performance under the Contract resulting from this Competitive Procurement, including, but not limited to: travel, lodging, meals, and incidentals will *not* be reimbursed to the OCM Services firm.
- 2) The State will consider rate cards with escalations for inflation. Bidders must include escalations in the proposed rates.
- 3) In order to promote uniformity in response and evaluation, the definitions below must be used for each staffing level:
 - a. Leadership: At least **fifteen years'** experience in business process transformation, system implementation, public sector or market specialty (e.g. security) **and** a leadership position within the Bidder's firm.
 - b. Senior: At least **ten years' experience** in business process transformation, system implementation, public sector or market specialty (e.g. security).
 - c. Experienced: At least **five years'** experience in business process transformation, system implementation, public sector or market specialty (e.g. security).
 - d. Junior: Qualified resource without an expectation of minimum experience.

5 Evaluations and Contract Award

The State will use the evaluation process outlined in this section to evaluate Proposals from qualified Bidders and select the Apparently Successful Bidder. The process is designed to award the Contract to the Bidder with the best combination of desired attributes based upon the evaluation criteria, not necessarily to the Bidder of least cost.

All Proposals and answers to CP items should be clear, complete and directly address the specific requirement or questions. A checklist to assist with Bidder responsiveness is provided in the Appendix H – *Proposal Submission Checklist*. In those cases where a Bidder’s written Proposal is unclear, the evaluation team may, at its discretion and acting through the CP Coordinator, contact the Bidder to clarify specific points in a Proposal. Proposals will be evaluated in accordance with the requirements set forth in this CP and any issued addenda.

5.1 Evaluation Process

One Washington will use a four phase evaluation process to select the OCM Service provider, as set forth below:

Phase 1: Administrative Proposal Evaluation

Phase 2: Organizational Change Management Experience and Approach and Financial Response Evaluation

1. Qualifications, Experience and Organizational Change Management Experience and Approach Score
2. Compensation Worksheet and Rate Card Score
3. Bidder SCOR

Phase 3: Bidder Onsite Presentation/Interviews and Reference Checks

1. Onsite Bidder Presentation/Interviews
2. Firm and Key Staff Reference Checks
3. Recommendation for Final Interview

Phase 4: Final Interview/Selection of the Apparently Successful Bidder

These phases are described in further detail in the sections below.

Information provided in Bidder’s Proposal must be in accordance with the instructions provided within *Section 2.25: [Format of Proposals and Proposal Content](#)* under CP Administrative Requirements.

5.1.1 Phase 1: Administrative Proposal Evaluation

The objective of the Administrative Proposal Evaluation is to confirm that the Bidder’s proposal meets the submission requirements of the Work Request and meets all Mandatory Requirements. The Solicitation Coordinator will accept proposals in accordance with the requirements provided within *Section 9. Administrative*

Requirements. The Solicitation Coordinator will conduct this phase of the evaluation process. The Solicitation Coordinator may, if necessary, request assistance from one or more members of the evaluation team. Proposals meeting all submission requirements and passing all (M) Mandatory Requirements will pass to Phase 2 of the evaluation process.

Proposals failing the Administrative Proposal Evaluation will not be further evaluated and Bidder will receive e-mail notification from the CP Coordinator of the rejection of their Proposal.

5.1.2 Phase 2: Organizational Change Management Technical and Financial Response Evaluation

During Phase 2, the Bidder’s written proposal and the pricing proposal will be independently evaluated using the point allocations found in the table below.

Ref #	CP Item	Response Type	Max Score
	OCM Services Requirements Proposal		
4.2.3	Public Sector Practice	MS	10
4.2.4	Business Transformation Capabilities	MS	10
4.2.5	Organizational Change Management Methodology	MS	10
4.2.6	Change Management Approach	MS	10
4.2.7	OCM Philosophy and Relationship Approach	MS	10
4.2.8	Staffing Approach	MS	10
4.2.9	Statements of Work Response		
4.2.9.1	SOW 1 - OCM Services Integral Resumes	MS	10
4.2.9.2	SOW 2 – Organizational Change Management Plan	MS	10
4.2.9.3	SOW 3 – Current Agency Business Processes	MS	10
4.2.9.4	SOW 4 – Agency Change Management	MS	10
Technical Subtotal			100
4.3	Pricing Proposal		
4.3.1	Statement of Work 1: OCM Services Consultants	MS	10
4.3.2	Rate Card	MS	10
Pricing Subtotal			20

Total	120
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5.1.2.1 Phase 2: Evaluation of Organizational Change Management Qualifications, Experience and Approach

The evaluation of the Qualifications, Organizational Management Experience and Approach will be completed by the Evaluation Team consisting of a group of subject matter experts from the One Washington Program and peers from outside agencies or departments.

Phase 2 will use consensus scoring. Each team member will independently review and score the Bidder’s Proposal. The Evaluation Team will then participate in a scoring session facilitated by the Solicitation Coordinator where a consensus score will be determined for each scored element of the CP.

Additionally, each evaluator will identify Strengths, Challenges, Opportunities and Risks (SCOR) associated with Bidder’s Qualifications, Experience and Organizational Management Approach. The SCOR analysis will be used in Phase 4 of the evaluation process as described in *Section 5.1.4: Phase 4: [Selection of Apparently Successful Bidder](#)*.

5.1.2.2 Phase 2: Pricing Proposal Evaluation

The evaluation of the Pricing Proposal will be completed by the CP Coordinator in accordance with the pricing methodologies outlined below. The two elements of Bidder’s price scores include SOW 1 and the Rate Card. Each element has a different formula by which points will be awarded.

Price Points for SOW 1

The lowest priced Bidder will receive the maximum number of available price points for SOW 1. All other bidders will receive points according to the following formula:

$$\frac{\text{Lowest Cost from All Proposals}}{\text{Cost of Proposal Being Evaluated}} \times 10 = \text{Score}$$

(maximum section score)

Figure 1: SOW 1 Price Scoring Formula

Price Points for Rate Card

Bidders will provide their pricing response to the rate card in Appendix G in accordance with *Section 4.3.2: [Rate Card](#)* of this CP. As part of the evaluation, OFM will perform the following calculation:

- 1) Sum the rates for each staff level across the 2-year term.
- 2) Apply the weighting factor to each staff level per the table reflected in below.

The applied weighting factor reflects One Washington’s desire to have the Senior and Experienced staff rates as competitive as possible. One Washington believes that these are the most critical resources assigned to the program and will comprise the majority of the required staffing.

Sum: Year 1 - Year 2	Sum of all Leadership rates	Sum of all Senior rates	Sum of all Experienced rates	Sum of all Junior rates	
Weighted Multiplier	1.0	3.0	3.0	2.0	
Weighted Score	= Sum of all Leadership rates X Weighted Multiplier	= Sum of all Senior rates X Weighted Multiplier	= Sum of all Experienced rates X Weighted Multiplier	= Sum of all Junior rates X Weighted Multiplier	Final Weighted Score = Sum of Weighted Scores

- 3) Sum the weighted scores across all four levels to calculate the Bidders Final Weighted Score.
- 4) Bidders final score will then be calculated using the following formula:

$$\frac{\text{Lowest Final Score from All Proposals}}{\text{Final Score from Proposal being evaluated}} \times 10 = \text{Score}$$

(maximum section score)

Figure 2 Rate Card Scoring Formula

5.1.2.3 Phase 2: Bidder Combined Total Score

Bidders will receive a Combined Total Score representing the sum of each individual score received from the pricing proposal evaluation and the qualifications, experience and OCM Approach evaluation. All total scores will then be ranked from high to low and a competitive range will be identified based on the logical clustering of scores. OFM will invite up to three (3) Bidders within the top of the competitive range to advance to the Bidder Presentation/Interview phase of the evaluation process. The point scores assigned in Phase 2 *will not carry forward* once they have been used to determine the Bidders invited to participate in the next Phase.

Following the completion of Phase 2, the Solicitation Coordinator will contact selected Bidders to invite them to participate in Phase 3 and schedule the Bidder's participation for an onsite Interview and Presentation. The Solicitation Coordinator will provide the Bidder with the instructions, topics and questions for the Presentation/Interview session

5.1.3 Phase 3: Bidder Onsite Presentation/Interviews

Confirm the State's understanding of the Bidder's Qualifications, Experience;

1. Allow the Bidder to present their qualifications and experience as they apply to the Bidder's approach to the One Washington Program and initiatives; and
2. Validate Bidder references.

The Bidders who are invited to Phase 3 of the evaluation process will be evaluated by the Presentation/Interview Evaluation Team. Bidders will be asked to respond to prepared interview questions and presentation criteria provided to them by OFM with their invitation to Phase 3.

Phase 3 will be evaluated using the Strengths, Challenges, Opportunities/Options and Risks (SCOR) Analysis described below.

Strengths, Challenges, Opportunities/Options and Risks (SCOR) Analysis Description

The goal of the SCOR Analysis is to support the qualitative evaluation of Bidder experience, capabilities, approach, and fit to provide effective OCM Services to the One Washington Program business transformation and system implementation projects. The SCOR analysis is expected to result in a determination of the Bidder with the best possible qualifications and approach to support, through provision of quality OCM Services, the success of the Washington State goals for the One Washington Program.

This assessment will be made based on all applicable information flowing from the solicitation.

Each individual evaluator will prepare a worksheet with a narrative of their own observations and assessment of the Bidder's SCOR for each element of the evaluation process that is subject to this method. Upon completion of the individual SCOR evaluation process, a consensus SCOR process facilitated by the Solicitation Coordinator will be conducted wherein evaluators discuss their individual analysis and agree upon a consensus SCOR and final ranking of the Bidders. In making their final recommendation, the evaluation team may take into consideration any applicable information derived from this solicitation process to determine which Bidder will best meet the OCM Services needs of One Washington.

Phase 3: Firm and Key Staff Reference Checks

Phase 3 will also include checking firm and Key Staff references provided by Bidder firm and staff references provided in response to *Section 4.2.9.1: [OCM Services Consultants](#)*. OFM may decide to only check references for the firm that is recommended as the Phase 4 Finalist. The SCOR Analysis will be used to evaluate these references.

5.1.4 Phase 4: Selection of Apparently Successful Bidder

The Final Interview/Selection will be conducted by the OFM One Washington Executive Director and other interviewers as the Executive Director determines are in the state's best interest. Bidder(s) invited to Phase 4 are expected to participate in person in Olympia, Washington on the dates set forth in the [Schedule of Procurement Activities](#) for this solicitation. The Executive Director may consider all information flowing from the evaluation process as well as Bidder's performance under any past or current contracts with the State of Washington. OFM reserves the right to contact others who may have pertinent information regarding the Bidder's prior performance, experience and ability to perform the services contemplated in this competitive procurement. These contacts are in addition to the references provided by the Bidder.

5.2 Proposals Based On Most Favorable Terms

Bidder should submit proposals based on the most favorable terms that the Bidder can propose, as OFM reserves the right to accept Bidder's proposal in its entirety without further negotiations. However, OFM reserves the right to negotiate with one or more of the top Bidders' contract terms and conditions and the pricing proposed in Bidder's proposal. OFM may request a Best and Final Offer of terms and conditions and pricing from one or more of the top scoring Bidders before announcing the ASB.

OFM reserves the right, at any phase of the procurement, to contact a Bidder for clarification of its proposal, and any such clarification by Bidder must be submitted in writing and, once submitted, will become part of Bidder's Proposal.

5.3 Notification to Bidders

At the end of Phase 4, the ASB will be notified by the CP Coordinator and will proceed to Contract negotiations. Individuals or firms not selected for further negotiation or award will be notified separately by e-mail.

5.4 Submittal Acceptance Period

All Proposals, including pricing, must be fixed and held open for a minimum of 120 days from the date of receipt of the Bidder's Proposal. OFM reserves the right to work with the Bidder to extend such minimum 120-day period, as desired by OFM.

5.5 Debriefing of Unsuccessful Bidders

Any Bidder who has submitted a proposal and been notified that they were not selected for contract award may request a debriefing. The request for a debriefing conference must be received by the CP Coordinator within three (3) Business Days after the announcement of the Apparently Successful Bidder. Debriefing requests must be received by the CP Coordinator no later than 3:30 PM, local time, in Olympia, WA on the date set forth in *Section 2.2: [Schedule of Procurement Activities](#)* of this CP. The debriefing will be held on the date set forth in *Section 2.2: [Schedule of Procurement Activities](#)* of this CP.

Discussion at the debriefing conference will be limited to the following:

- Evaluation and scoring of the firm's proposal
- Critique of the proposal based on the evaluation
- Review of Bidder's final score in comparison with other final scores without identifying the other firms

Comparisons between Proposals or evaluations of the other Proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

5.6 Protest Procedure

Protests may be made only by Unsuccessful Bidders who submitted a Proposal to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Bidder is allowed five (5) Business Days to file a protest of the acquisition with the CP Coordinator. Protests must be received by the CP Coordinator no later than 3:30 PM, local time, in Olympia, WA on the date set forth in *Section 2.2: [Schedule of Procurement Activities](#)* of this CP. Protests may be submitted by e-mail or facsimile, but must then be followed by the document with an original signature.

Bidders protesting this procurement must follow the procedures described below. Protests that do not follow these procedures will not be considered. This protest procedure constitutes the sole administrative remedy available to Bidders under this procurement.

All protests must be in writing, addressed to the CP Coordinator, and signed by the protesting party or an authorized Agent. The protest must state the CP number, the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included.

Only protests stipulating an issue of fact concerning the following subjects will be considered:

- A matter of bias, discrimination or conflict of interest on the part of an evaluator
- s in computing the score
- Non-compliance with procedures described in the procurement document or Department of Enterprise Services (DES) policy

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, or 2) OFM's assessment of its own and/or other agencies' needs or requirements.

Upon receipt of a protest, a protest review will be held by OFM. The OFM Director or an employee delegated by the Director, who was not involved in the procurement, will consider the record and all available facts and issue a decision within five (5) Business Days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Bidder that also submitted a proposal, such Bidder will be given an opportunity to submit its views and any relevant information on the protest to the CP Coordinator.

The final determination of the protest will:

- Find the protest lacking in merit and uphold OFM's action; or
- Find only technical or harmless s in OFM's acquisition process and determine OFM to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide OFM options, which may include:
 - Correct the s and re-evaluate all Proposals, and/or
 - Reissue the solicitation document and begin a new process, or
 - Make other findings and determine other courses of action as appropriate

If OFM determines that the protest is without merit, OFM will enter into a contract with the Apparently Successful Bidder. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.