STATE OF WASHINGTON

OFFICE OF FINANCIAL MANAGEMENT

REQUEST FOR PROPOSALS (RFP)

RFP NO. 25-400

Note to Vendors:

* This RFP and any subsequent Amendments will be available on the Office of Financial Management (OFM) website at <http://ofm.wa.gov/contracts_procurements/default.asp>.
* Vendors are also encouraged to register on the Department of Enterprise Services (DES), Washington Electronic Business Solution (WEBS) Procurement Website at [Register for Bid Opportunities | Department of Enterprise Services (DES)](https://des.wa.gov/sell/how-work-state/register-bid-opportunities)
* All RFP amendments or Bidder questions/OFM answers will be posted on the OFM website and on WEBS.

PROJECT TITLE: Cost Allocation Plan

PROPOSAL DUE DATE: July 28, 2025, 3:30 PM Local Time, Olympia, WA

ESTIMATED TIME PERIOD FOR CONTRACT: October 1, 2025 – September 30, 2030

BIDDER ELIGIBILITY: This procurement is open to those Bidders that satisfy the minimum qualifications stated herein and that are available for work in Washington State.

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# INTRODUCTION

## PURPOSE AND BACKGROUND

The Washington State Office of Financial Management hereafter referred to as "AGENCY,” is initiating this Request for Proposals (RFP) to solicit proposals from firms interested in participating on a project to prepare, submit, and negotiate for the federal approval of the annual state of Washington Statewide Central Services Cost Allocation Plan (SWCAP).

The state of Washington annually submits to the U.S. Department of Health and Human Services a SWCAP prepared in accordance with requirements listed in Appendix V to 2 CFR Part 200. The plan consists of two parts:

1. An Allocation of non-billed, central service costs benefiting state operating agencies with federal programs.
2. A financial reconciliation of billed central internal service activities that impact federally funded activity in operating states.

The Statewide Accounting Division of the AGENCY would provide the Contractor with financial reports extracted from the state's agency financial reporting system (AFRS). Individual central internal service activities would provide the contractor with specific information on activity descriptions, actuarial reports, and billing practices, as well as other financial data that provides more detail than is available in AFRS.

AGENCY intends to award one (1) contract to provide the services described in this RFP.

## OBJECTIVES

The objective of the contract is to prepare, submit and negotiate for federal approval the annual statewide central service cost allocation plan.

## SCOPE OF WORK

1. The CONTRACTOR will provide services and staff, and otherwise do all things necessary for or incidental to the performance of work, as set forth below:

* Technical Review and Recommendation. The Contractor or its representatives would be expected to review the most recent Washington SWCAP and offer any recommendations for improvement.
* Collection of Data. The Contractor would be expected to designate an individual(s) to work with the Agency and the various central service activities of the state to assemble necessary financial and narrative information to complete the plan. Presently, there are six allocated departments and thirty-one billed internal service activities (including pension and workers' compensation).
* Preparation of Plan Document. Contractor would be expected to process necessary allocations, complete all required information to be included in the proposed plan and submit the final proposed plan to the Agency for review and approval in time for the plan to be submitted to the U. S. Department of Health & Human Services by December 31st of each year.
* Federal Negotiations. The Contractor would be expected to work with the federal cost negotiator from U. S. Department of Health & Human Services and the Agency to resolve any questions or corrections pertaining to the proposed plan.

1. Extra Services: The AGENCY may require additional related services. These are to be considered Extra Services under this section. In the event Extra Services are required, the contract will be amended to provide specific details, including deliverables with due dates and cost.

## QUALIFICATIONS

1. Minimum Qualifications

Bidders who do not meet these minimum qualifications will be rejected as non-responsive and will not be evaluated or scored.

1. The Bidder must be licensed to do business in the State of Washington or provide a commitment that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Bidder.
2. The Bidder must have at least five (5) years' experience in developing federal indirect cost plans.
3. Working knowledge of OMB 2 CFR Part 200
4. OFM uses a two step-down allocation, so at a minimum, the Bidder should be able to produce a plan that allocates costs to a two step-down model.
5. Desirable Qualifications

* Working knowledge of the U.S. Department of Health and Human Services format to reconcile retained earnings to federal guidelines for billed internal service activities.

## FUNDING

The AGENCY has budgeted an amount not to exceed Thirty-One Thousand Seven Hundred Fifty Dollars ($31,750.00) per year and One Hundred Fifty-Eight Thousand Seven Hundred Fifty Dollars ($158,750.00) in total for this project for the initial five year term. Proposals in excess of $31,750.00 per year will be considered non-responsive and will not be evaluated.

Any contract awarded as a result of this procurement is contingent upon the availability of funding.

## PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about October 1, 2025, and to end on September 30, 2030. Amendments extending the period of performance, if any, shall be at the sole discretion of the AGENCY.

The AGENCY reserves the right to extend the contract for four(4) additional one-year periods.

## CURRENT OR FORMER STATE EMPLOYEES

Specific restrictions apply to contracting with current or former state employees pursuant to chapter 42.52 of the Revised Code of Washington (RCW). Proposers should familiarize themselves with the requirements prior to submitting a proposal that includes current or former state employees.

## DEFINITIONS

Definitions for the purposes of this RFP include:

Agency – The Office of Financial Management is the agency of the state of Washington that is issuing this RFP.

Apparent Successful Bidder – The Bidder selected as the entity to perform the anticipated services, subject to completion of contract negotiations and execution of a written contract.

Bidder – Individual or company who submits a proposal in order to attain a contract with the AGENCY.

Contract- The signed agreement(s), if any that may result from this solicitation, including all Attachments, Exhibits, Statement(s) of Work, all Amendments, and the Bidder’s response to this solicitation.

Contractor – Individual or company whose proposal has been accepted by the AGENCY and is awarded a fully executed, written contract.

Proposal – A formal offer submitted in response to this solicitation.

Proposer - Individual or company that submits a proposal in order to attain a contract with the AGENCY. Also known as “Bidder”.

Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the Bidder community to suggest various approaches to meet the need at a given price.

## ADA

The AGENCY complies with the Americans with Disabilities Act (ADA). Bidders may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

# GENERAL INFORMATION FOR BIDDERS

## RFP COORDINATOR

The RFP Coordinator is the sole point of contact in the AGENCY for this procurement. All communication between the Bidder and the AGENCY upon release of this RFP shall be with the RFP Coordinator, as follows:

|  |  |
| --- | --- |
| Name | Heather Aleckson |
| E-Mail Address | [Heather.Aleckson@ofm.wa.gov](mailto:Heather.Aleckson@ofm.wa.gov) |
| Phone Number | 360-890-0240 |

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

**It is recommended that you request a read receipt whenever sending an email to the RFP** **Coordinator to ensure your email is received.**

## ESTIMATED PROCUREMENT SCHEDULE

|  |  |
| --- | --- |
| Issue Request for Proposals | June 6, 2025 |
| Register for the Pre-bid Conference by 5:00 pm Pacific Time | June 13, 2025 |
| Attend Pre-bid Conference (optional)  Registration is required | June 18, 2025  1:30pm – 3:00pm PST |
| Bidder may submit written questions until 3:30 pm Pacific Time | June 25, 2025 |
| OFM issue responses to Bidder Questions | July 2, 2025 |
| Complaints due | July 18, 2025 |
| Bidder must submit Proposal by 3:30 pm Pacific Time | July 28, 2025 |
| OFM Evaluation of proposals | August 4, 2025 |
| Conduct oral interviews with finalists, if required | July 7, 2025 |
| Announce “Apparent Successful Bidder” and send notification via e-mail to unsuccessful proposers. Begin Contract negotiations. | August 11, 2025 |
| Unsuccessful Bidders may request Debriefing until 3:30 Pacific Time | August 15, 2025 |
| Holds Debriefing Conferences, if requested, at the earliest possible date, but no later than | August 19, 2025 |
| Estimated Effective date of Contracts | October 1, 2025 |

**The AGENCY reserves the right to revise the above schedule.**

## PRE-BID CONFERENCE (VIRTUAL)

An optional pre-bid conference is scheduled, see Procurement Schedule. This conference gives bidders a chance to ask questions in a live format in addition to the written Question and Answer procedure.

Anyone wanting to participate in the conference must register by emailing your intent to attend to the RFP Coordinator by 5:00pm PST on June 13, 2025. At that time, you will be forwarded the link to the Microsoft Teams meeting. If no registrations are received by 5:00pm PST on June 13, 2025, the conference will be canceled without notice.

Agency will be bound only to written answers to questions. Questions arising at the pre-bid conference or in subsequent communication with the Solicitation Coordinator, will be documented and answered in written form, which will be posted to WEBS and this [website](https://ofm.wa.gov/about/procurements-sole-source-contracts-and-intergovernmental-agreements#Currentprocurements).

## QUESTIONS AND ANSWERS

Bidders may e-mail questions to the RFP Coordinator. Questions will be accepted until the date set forth in the Procurement Schedule. Early submission of questions is encouraged. Questions and answers will be posted by Amendment on WEBS and on <http://ofm.wa.gov/contracts_procurements/default.asp> . Bidders may only rely on written statements issued by the RFP Coordinator. Any oral communications are unofficial and are not binding on OFM.

## SUBMISSION OF PROPOSALS

1. The Proposal must be received by the RFP Coordinator no later than 3:30pm Pacific Time, Olympia, WA on July 28, 2025.
2. It is recommended that you request a read receipt when sending your Proposal to the RFP Coordinator to ensure it has been received.
3. Scored items are awarded points as part of the evaluation conducted by the evaluation team.
4. Bidders are required to submit proposals as an attachment to an e-mail to the RFP Coordinator at the e-mail address above, on or before the proposal due date and time stated in Section 2.2. Attachments to e-mails must be in Microsoft Word or PDF format. Zipped files cannot be received by Agency and cannot be used for submission of proposals.
5. Bidders should allow sufficient time to ensure timely receipt of the proposal by the RFP Coordinator. Late responses will not be accepted and will be automatically disqualified.
6. Proposals may not be transmitted using facsimile transmission.
7. AGENCY assumes no responsibility for delays caused by Bidder’s e-mail, network problems or any other party.
8. All proposals and any accompanying documentation become the property of the Agency and will not be returned.

## PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

1. Proposals submitted in response to this solicitation shall become the property of the AGENCY. All proposals received shall remain confidential until the Apparently Successful Bidder has been announced; thereafter, the proposals shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW).
2. Any information in the Proposal that the Bidder desires to claim as proprietary and exempt from disclosure under the provisions of Chapter 42.56 RCW must be clearly designated as such and must identify the specific exemption from disclosure upon which the Bidder is making the claim. 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. Marking the entire Proposal exempt from disclosure or as Proprietary Information will not be honored
3. If a public records request is made for a proposal containing information that the Bidder has marked as "Proprietary Information," Agency will ask the requester for permission to redact all information identified as “Proprietary Information.” If the requester agrees, Agency will redact all information identified as “Proprietary Information” prior to providing the proposal to the requester. Agency may request the Bidder to provide a redacted copy of the proposal to satisfy the records request. If the requester does not agree, Agency 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 the Bidder fails to obtain the court order enjoining disclosure, Agency will release the requested information on the date specified. 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, Agency shall maintain the confidentiality of the Bidder information per the court order.
4. A charge will be made for copying and shipping, as outlined in RCW 42.56. No fee shall be charged for inspection of contract files, but twenty-four (24) hours’ notice to the Solicitation Coordinator is required. All requests for information should be directed to the Solicitation Coordinator.

## PUBLIC POSTING OF PROPOSALS OF AWARDED BIDDER(S)

1. Agency will publicly post the proposal(s) of the awarded Bidder(s) that were submitted in response to this solicitation. These proposals shall be posted [here](https://ofm.wa.gov/about/procurements-sole-source-contracts-and-intergovernmental-agreements#Currentprocurements) once the Apparent Successful Bidder(s) are announced.
2. Information in a proposal that the Bidder desires to claim as proprietary must be clearly designated as stated in Section 2.6 of this Solicitation. For the purposes of this section, if the awarded Bidder(s) has marked information proprietary in their proposal, Agency will ask them to provide a redacted version within five (5) business days of the written request.

## REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, Amendments will be published on WEBS and on <http://ofm.wa.gov/contracts_procurements/default.asp>. For this purpose, the published questions and answers and any other pertinent information shall be provided as an amendment to the RFP and will be placed on the website.

**If you did not receive this solicitation via WEBS, please register with WEBS at the website above in order to receive further notifications.**

The AGENCY also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

## MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with Chapter 39.19 of the Revised Code of Washington (RCW), the State of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women’s Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award and proposals will not be rejected or considered non-responsive on that basis.

The established annual procurement participation goal for certified Minority and Women-owned Business Enterprises is 10% for this type of project. These goals are voluntary. Bidders may contact OMWBE at (360) 753-9693 to obtain information on certified firms.

## VETERAN AND SERVICE MEMBER OWNED BUSINESS PARTICIPATION

In accordance with Chapter 43.60A.200 of the RCW, the State of Washington encourages the participation of Veteran and Service Member Owned Business certified by the Washington State Department of Veteran Affairs (DVA). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of DVA participation shall be required as a condition for receiving an award and proposals will not be rejected or considered non-responsive on that basis.

The established annual procurement participation goal for certified Veteran owned Business Enterprises is 1% for this type of project. These goals are voluntary. Bidders may contact OMWBE at (360) 753-9693 to obtain information on certified firms.

## ACCEPTANCE OF RFP TERMS

The Bidder acknowledges that the submission of a Bid which includes a signed Bidder Certification and Assurance Form, attached as Attachment B, constitutes a binding offer that is valid for 60 days from the due date for receipt of proposals.

## RESPONSIVENESS

a. All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this solicitation. The Bidder is specifically notified that Agency may reject or withdraw a proposal at any time as nonresponsive for any of the following reasons:

• Incomplete proposal

• Failure to comply with any part of this solicitation or any Attachments to this s solicitation

• Submission of incorrect, misleading, or false information.

b. Agency also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

## MOST FAVORABLE TERMS

The AGENCY reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the Bidder can propose. There will be no best and final offer procedure. The AGENCY does reserve the right to contact a Bidder for clarification of its proposal.

The Apparent Successful Bidder (ASB) should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Bidder’s proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to the AGENCY.

## CONTRACT AND GENERAL TERMS & CONDITIONS

The ASB will be expected to enter into a contract which is substantially the same as the Sample Contract and its General Terms and Conditions attached as Attachment C. In no event is a Bidder to submit its own standard contract terms and conditions in response to this solicitation.

The Bidder may submit exceptions as allowed in the Certifications and Assurances form, Attachment B to this solicitation. All exceptions to the contract terms and conditions must be submitted as Track Changes to Attachment C. Bidder must explain the reason for each requested exception, identifying the language in Attachment C found problematic, the reason Bidder finds the language to be problematic, and any recommended methods/alternate language of mitigating or limiting the perceived negative consequences. Bidder must also explain why each item proposed as a change to a contract term is in the state’s best interest as a customer and how it will support the state’s business objectives. Where terms and conditions cannot be changed and may result in negative consequences on the quality of services or their supply, Bidders are required to recommend methods of mitigating or limiting these negative consequences.

The AGENCY will review requested exceptions and accept or reject the same at its sole discretion. Requested exceptions may be grounds for disqualification from further consideration in the award of a Contract, at the AGENCY’s discretion.

## SUBCONTRACTOR PARTICIPATION MONITORING AND REPORTING

1. If awarded Contractor will be using subcontractors, then once a contract is awarded through the solicitation process, the awarded Prime Contractor is obligated to complete the vendor registration in Access Equity. Access Equity is a secure online vendor management system (B2GNow). Confidential information (Tax ID, etc.) will not be published. Prime Contractors that have previously registered with B2Gnow for any public entity must verify the system has updated information. Contractors can access the system at https://omwbe.diversitycompliance.com/ or through a direct link on the Office of Minority and Women’s Business Enterprises (OMWBE) website at: https://omwbe.wa.gov/.

b. Each month during the contract, the Prime Contractor will report payments to ALL Subcontractors through the Access Equity system. This monthly reporting information includes total payment in dollars made to the Subcontractor, payment dates, and any additional information required to verify payment to Subcontractors. The Prime Contractor will enter this payment information into the Access Equity system, and the Subcontractors will verify this payment information in the system. Online training is available through the Access Equity/B2Gnow system. This requirement applies to both Prime Contractors and Subcontractors.

## COSTS TO PREPARE PROPOSAL

The AGENCY will not be liable for any costs incurred by the Bidder in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP

## NO OBLIGATION TO CONTRACT

This RFP does not obligate the state of Washington or the AGENCY to contract for services specified herein.

## REJECTION OF PROPOSALS

The AGENCY reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

## COMMITMENT OF FUNDS

The Director of the AGENCY or their delegate is the only individual who may legally commit the AGENCY to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

## INSURANCE COVERAGE

The Contractor is to furnish the Agency with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The Contractor shall, at its own expense, obtain and keep in force insurance coverage which shall be maintained in full force and effect during the term of the contract. The Contractor shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to the Agency within fifteen (15) days of the contract effective date.

Should a Bidder find the following insurance requirements to be overly burdensome, the Bidder should include in its Letter of Submittal a statement substantiating such. If Bidder makes no such statement in the Letter of Submittal, Agency will assume that the Bidder is able to meet the requirements.

Liability Insurance

1. Commercial General Liability Insurance: Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than $1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the “each occurrence” limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the “each occurrence” limit. CGL insurance shall be written on ISO occurrence from CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insureds (cross liability) condition.

Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

1. Business Auto Policy: As applicable, the Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than $1,000,000 per accident. Such insurance shall cover liability arising out of “Any Auto.” Business auto coverage shall be written on ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

Employers Liability (“Stop Gap”) Insurance: In addition, the Contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than $1,000,000 each accident for bodily injury by accident or $1,000,000 each employee for bodily injury by disease.

Additional Provisions

Above insurance policy shall include the following provisions:

1. Additional Insured. The state of Washington, Office of Financial Management, its elected and appointed officials, agents and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the state.
2. Cancellation. State of Washington, Office of Financial Management, shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the state 45 days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the state shall be given 10 days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The state shall be given 20 days advance notice of cancellation. If cancellation is due to non-payment of premium, the state shall be given 10 days advance notice of cancellation.
3. Identification. Policy must reference the state’s contract number and the agency name.
4. Insurance Carrier Rating. All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best’s Reports. Any exception shall be reviewed and approved by Office of Financial Management Risk Manager, or the Risk Manager for the state of Washington, before the contract is accepted or work may begin. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with Chapter 48.15 RCW and 284-15 WAC
5. Excess Coverage. By requiring insurance herein, the state does not represent that coverage and limits will be adequate to protect Contractor, and such coverage and limits shall not limit Contractor’s liability under the indemnities and reimbursements granted to the state in this contract.

Workers’ Compensation Coverage

The Contractor will at all times comply with all applicable workers’ compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The state will not be held responsive in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

## ELECTRONIC PAYEMENT

The state of Washington prefers to utilize electronic payment in its transactions. Proposers who are awarded a contract as a result of this RFP must register in the Statewide Vendor Payee Registration System. The Department of Enterprise Services (DES) maintains a central contractor registration file for Washington State agencies to process Contractor payments. To obtain registration materials and instructions for registration go to <https://des.wa.gov/services/contracting-purchasing/doing-business-state/receiving-payment-state>.

## COMPLAINT PROCESS

This procedure is available to potential Bidders who are contemplating submitting a bid in response to this RFP. Only complaints concerning the following subjects shall be considered:

• A claim that the solicitation unnecessarily restricts competition;

• A claim the solicitation evaluation or scoring process is unfair or flawed, or

• A claim the solicitation requirements are inadequate or insufficient to prepare a response.

Bidders complaining about this procurement shall follow the procedures described below. Complaints that do not follow these procedures shall not be considered. If a Bidder registers a complaint against this solicitation, 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 AGENCY Procurement Coordinator, or designee, and needs to be received no later than 3:30 PM, local time, Olympia, WA, on July 18, 2025 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 the AGENCY. The AGENCY procurement coordinator will respond to complaints in writing and the AGENCY director will be notified of all complaints and provided a copy of the AGENCY’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.

# PROPOSAL CONTENTS

Proposals must be written in English.

Proposals must be submitted with the same headings as labeled below. This will not only be helpful to the evaluators of the proposal, but should assist the Bidder in preparing a thorough response.

## ADMINISTRATIVE REQUIREMENTS

1. Letter of Submittal.

The Letter of Submittal, Attachment A, must be completed and submitted with your proposal. It must be signed and dated by a person authorized to legally bind the Bidder to a contractual relationship, e.g., the president or executive director of a corporation, the managing partner of a partnership, or the proprietor of a sole proprietorship. Signing the Letter of Submittal indicates that the Bidder accepts the terms and conditions of the RFP. Failure to submit will result in disqualification.

1. Bidder Certification and Assurances Form

Bidders must submit a completed Bidder Certification and Assurances Form, Attachment B. Please sign and include any attachments that are necessary. It must be signed and dated by a person authorized to legally bind the Bidder to a contractual relationship, e.g., the president or executive director of a corporation, the managing partner of a partnership, or the proprietor of a sole proprietorship. Failure to submit a signed Applicant Certification and Assurances Form may result in disqualification.

1. Wage Theft Certification

Bidders must submit a completed and signed Wage Theft Certification Form, Attachment D. Failure to submit will result in disqualification.

1. Executive Order 18-03 Contractor Certification (5 Points)

Bidders must submit a completed and signed Executive Order 18-03 Certification Form, Attachment E. Failure to submit will result in disqualification.

1. Diverse Business Inclusion Plan.

Bidders who intend to use subcontractors if awarded a Contract, to be considered responsive, must submit the Diverse Business Inclusion Plan Form as part of their bid, Attachment F.  If using subcontractors, and if awarded a Contract, Bidder’s Diverse Business Inclusion Plan will be incorporated into the terms and conditions of the Contract.  The responses should reflect genuine efforts for diverse business inclusion.

This Diverse Business Inclusion Plan is NOT required if Bidder does not intend to use subcontractors.

In accordance with [RCW 39.19](http://apps.leg.wa.gov/RCW/default.aspx?cite=39.19), the state of Washington encourages participation in all of its contracts by OMWBE certified firms.  In accordance with [RCW 43.60A.200](https://app.leg.wa.gov/RCW/default.aspx?cite=43.60A.200), the state of Washington encourages participation in all of its contracts from firms certified by WDVA.

1. Reference Section

Utilize Attachment G to list names, addresses, telephone numbers, and e-mail addresses of three (3) business references for the Bidder. Briefly describe the type of service provided to each reference. Do not include current Agency staff as references.

By submitting a proposal in response to this solicitation, the Bidder and team members grant permission to Agency to contact these references and others, who from Agency’s perspective, may have pertinent information. Agency may or may not, at its discretion, contact references. Agency may evaluate references at Agency’s discretion.

1. OMWBE Certification

If you are certified as a minority-owned firm and/or women-owned firm, include proof of certification issued by the Washington State Office of Minority and Women’s Business Enterprises (OMWBE).

1. DVA Certification

If you are a certified Veteran and Service Member owned firm, include proof of certification issued by the Washington State Department of Veteran Affairs (DVA).

## TECHNICAL (45 Points Possible)

For the Technical Proposal the Bidder must respond separately to items A-D below and contain a comprehensive description of services, which will convey to evaluators the Bidder’s understanding of the project. The number in parentheses after each requirement description represents the maximum number of points that may be awarded for the Applicant’s response to that requirement.

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1. Project Approach/Methodology – Include a complete description of the Bidder’s proposed approach and methodology for the project. This section should convey Bidder’s understanding of the proposed project.

(15 Points)

1. Work Plan - Include all project requirements and the proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP. This section of the technical proposal must contain sufficient detail to convey to members of the evaluation team the Bidder’s knowledge of the subjects and skills necessary to successfully complete the project. The Bidder may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.

(10 Points)

1. Project Schedule – Include a project schedule indicating when the elements of the work will be completed and when deliverables, if any, will be provided.

(10 Points)

1. **Deliverables** – Fully describe deliverables to be submitted under the proposed contract. Deliverables must support the requirements set forth in Section 1.3 Scope of Work.

(10 Points)

## MANAGEMENT (35 Points Possible)

Points Awarded for Requirements. The number in parentheses after each requirement description represents the maximum number of points that may be awarded for the Applicant’s response to that requirement.

1. **Project Management**
2. Project Team Structure/Internal Controls - Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Include who within the firm will have prime responsibility and final authority for the work.

(10 points)

1. **Staff Qualifications/Experience** - Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. **The lead staff person must have a minimum of five (5) years’ experience developing federal indirect cost plans**. Provide resumes for the named staff, which include information on the individual’s particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The Bidder must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the AGENCY.

(10 points)

1. **Experience of the Bidder**
2. Indicate the experience the Bidder and any subcontractors have in the following areas:
   1. Preparing and negotiating Central Service Cost Allocation Plans
   2. Providing assistance to governmental agencies in the preparation and submission of federal indirect rate or cost allocation plans.
3. Indicate other relevant experience that indicates the qualifications of the Bidder, and any subcontractors, for the performance of the potential contract.
4. Include a list of contracts the Bidder has had during the last five years that relate to the Bidder’s ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.

(15 points)

## COSTS (20 Points Possible)

The evaluation process is designed to award this procurement not necessarily to the Bidder of least cost, but rather to the Bidder whose proposal best meets the requirements of this RFP. Bidders are encouraged to submit proposals which are consistent with state government efforts to conserve state resources.

1. **Identification of Costs**

A.1 Costs for Annual Cost Allocation Plan Referenced in Sections 1.1 and 1.3 (20 Points)

Provide a total fixed price cost for Year One (1) Annual Cost Allocation Plan as referenced in Sections 1.1 and 1.3. Please note that while the proposal should include pricing for one (1) year only, this cost will be applied to all five years and any additional terms. The fixed cost should include the following:

a. A fully detailed budget for the Annual Cost Allocation Plan including staff costs, administrative costs, travel costs, and any other expenses necessary to accomplish the objectives and produce the deliverables under the contract.

b. The proposed number of hours per person with job title and their hourly rate.

c. A table showing the anticipated number of hours each assigned staff person is expected to devote to each major project activity.

Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Office of Minority and Women's Business Enterprises.

Expenses will not be reimbursed as a separate item for the Cost Allocation Plan(s).

A.2 Costs for Extra Services Referenced in Section 1.3

The cost proposal must separately state an all-inclusive hourly rate by job title for the Extra

Services contemplated in Section 1.3. The hourly rate must include any and all expenses. In the event Extra Services are utilized, expenses will not be reimbursed as a separate item. Extra Services are outside what is necessary to produce the plan, submit the plan, negotiate and finalize and approval of the plan.

Failure to provide an all-inclusive hourly rate for Extra Services will result in the proposal being deemed non-responsive and the proposal will not be evaluated.

No points will be awarded for the Extra Services cost proposal.

# EVALUATION AND CONTRACT AWARD

## EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any Amendments issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by the AGENCY, which will determine the highest scoring Bidder for selection as the ASB.

The RFP Coordinator reserves the right to contact Bidders for clarification of any portion of the Bidder’s Proposal.

## PROCUREMENT EVALUATION FOR EXECUTIVE ORDER 18-03

(FIRMS WITHOUT MANDATORY ARBITRATION FOR EMPLOYEE)

Pursuant to RCW 39.26.160(3) and consistent with Executive Order 18-03 – Supporting Workers’ Rights to Effectively Address Workplace Violations, dated June 12, 2018, AGENCY will evaluate bids for best value and provide a bid preference of **5 points** to any bidder who certifies, pursuant to the certification attached as **Attachment E – Contractor Certification for Executive Order 18-03 – Workers’ Rights,** that their firm does NOT require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waiver.

## ORAL INTERVIEWS (Optional)

Oral interviews may be utilized in selecting the winning proposal. The Agency, at its sole discretion, may elect to select the top-scoring firm(s) from the written evaluation for an oral interview. Agency will contact the top-scoring firm(s) to schedule a date, time and location for an oral presentation. Commitments made by the Bidder at the oral interview, if any, will be considered binding.

The scores from the written evaluation and the oral presentation combined together will determine the ASB.

## EVALUATION SCORING

1. The following points will be assigned to the proposal for evaluation purposes:

|  |  |
| --- | --- |
| Technical | 45 points |
| Management | 35 points |
| Costs  Executive Order 18-03 Certification | 20 points  5 points |
| Subtotal | 105 Points |
| Oral Interview (optional) | 100 Points |
| TOTAL Maximum Points | 205 Points |

1. Each evaluator will score the Technical and Management answers separately. The scores of all the evaluators will be averaged to determine the Bidder’s score for that item.
2. Costs scoring

The RFP Coordinator will score the Total Fixed Cost. 20 points will be awarded to the lowest bid. All others will be scored by dividing the lowest responsive total budget cost by your total budget cost. The resulting percentage will be multiplied by the 20 points available to arrive at your score. See example calculation in the box below.

|  |
| --- |
| Example  Lowest bid = $1,000.00  Bidder B = $1,250.00  $1,000.00 divided by $1,250.00 = 0.80  0.80 x 20 points possible = 16 points  Bidder B’s score would be 16 points for the total fixed cost |

1. The scores for all the items will be added together to determine the Bidder’s total score. Agency reserves the right to award the contract to the Bidder whose Proposal is deemed to be in the best interest of the Agency and the state of Washington.

## FINAL DETERMINATION OF THE APPARENT SUCCESSFUL BIDDERS

a. Agency program staff and/or management may conduct a final review of the evaluation and scoring of the finalist(s).

b. In this final review, Agency may consider past or current performance of any Agency contracts by a finalist(s), and any experience of the program or Agency in working with a finalist(s) under any past or current contract with Agency.

c. In doing so, Agency management shall be guided, but not bound, by the scores awarded by the evaluators. Program staff and Agency management shall determine which Proposals reviewed during this final selection process will best meet the needs of Agency.

d. Any Bidder who would be an ASB based on the scores awarded by the evaluators, and who is not selected, shall be provided, upon request, the reasons why Agency selected a Bidder with a lower final score.

## NOTIFICATION TO BIDDERS

The AGENCY will notify the ASB of their selection in writing upon completion of the evaluation process. An announcement of the ASB will be made via WEBS. All Bidders who responded to this solicitation will receive an e-mail from WEBS notifying them of the ASB.

## DEBRIEFING OF UNSUCCESSFUL PROPOSERS

a. Any Bidder, that was not disqualified, who has submitted a proposal and been notified that they were not selected as an ASB may request a debriefing. The request for a debriefing conference must be received by the Solicitation Coordinator no later than 3:30 PM, local time, Olympia, Washington, on the date set forth in the Procurement Schedule.

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

* Evaluation and scoring of the Bidder’s Proposal;
* Critique of the requesting Bidder’s Proposal based on the evaluation; and
* Review of Bidder’s final score in comparison with other final scores without identifying the other firms.

c. 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 (1) hour.

## PROTEST PROCEDURE

Protests may be made only by Bidders who submitted a response 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 RFP Coordinator. Protests must be received by the RFP Coordinator no later than 3:30 PM, local time, in Olympia, Washington on the fifth business day following the debriefing. Protests may be submitted by email but must then be followed by the document with an original signature.

Bidders protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall 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 RFP Coordinator, and signed by the protesting party or an authorized Agent. The protest must state the RFP 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 shall be considered:

* A matter of bias, discrimination or conflict of interest on the part of an evaluator;
* Errors in computing the score;
* Non-compliance with procedures described in the procurement document or AGENCY 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) AGENCY’S assessment of its own and/or other agencies’ needs or requirements.

Upon receipt of a protest, a protest review will be held by the AGENCY. The AGENCY 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 RFP Coordinator.

The final determination of the protest shall:

* Find the protest lacking in merit and uphold the AGENCY’s action; or
* Find only technical or harmless errors in Agency’s procurement process and determine Agency to be in substantial compliance and reject the protest; or
* Find merit in the protest and provide the AGENCY options which may include:

-- Correct the errors 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 the AGENCY determines that the protest is without merit, the AGENCY will enter into a contract with the ASB. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

# RFP Attachments

   

  