STATE OF WASHINGTON OFFICE OF FINANCIAL MANAGEMENT OLYMPIA, WASHINGTON

REQUEST FOR QUALIFICATIONS AND QUOTATIONS RFQQ NO. 22-1000

Note to Vendors: This RFQQ 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

http://des.wa.gov/services/ContractingPurchasing/Business/Pages/WEBSRegistration.aspx. All solicitation Amendments and Bidder questions/OFM answers will be posted on the OFM website and on WEBS.

PROJECT TITLE: Workforce Development Evaluation

PROPOSAL DUE DATE: December 07, 2022, 3:30 PM Pacific Time, Olympia,

Washington

ESTIMATED CONTRACT TERM: January 19, 2023 - August 31, 2023

BIDDER ELIGIBILITY: This competitive solicitation is open to those Vendors who satisfy the minimum qualifications stated herein and who are available for work in Washington State.

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1. INTRODUCTION

1.1 PURPOSE AND BACKGROUND

a. The Washington State Office of Financial Management (OFM) is initiating this Request for Qualifications and Quotations (RFQQ) to solicit proposals from firms interested in conducting an evaluation of the impact OFM/Serve Washington (Serve WA) workforce development efforts on AmeriCorps members outcome after they transition out of their service term, and the effects additional supports such as career coaching has on these members.

b. Contract Term

The period of performance of any contract resulting from this solicitation is tentatively scheduled to begin on or about January 19, 2023, and to end on August 31, 2023. Amendments extending the period of performance, if any, shall be at the sole discretion of OFM. OFM reserves the option to renew the contract for one (1) additional term of six (6) months.

c. Background

Serve WA supports a cross-program statewide effort providing AmeriCorps members, within the 17 to 25 age range, with service-to-career pipeline supports that knit together four components: (1) the on-the- ground experience gained through service; (2) training to connect the skills gained from service to future job opportunities; (3) opportunities to earn a credential that can act as an on-ramp to further education and credentials; (4) and guidance and support as members transition from service to a career pathway.

Serve WA also provides additional support for programs with a higher percentage of Black, Indigenous, people of color (BIPOC) members and/or members with lived experience, including youth currently connected to or at high-risk of becoming connected to the juvenile court system or youth in the foster care system.

d. Objectives:

Conduct an evaluation on the impact of the following workforce development efforts to support Serve WA in assessing the value of investing in member career development:

- a. All AmeriCorps members in the state of Washington are provided career readiness diagnostics to aid Serve WA's assessment of its full portfolio and to support an argument for sustained state funding.
- b. AmeriCorps members also have access to a catalogue of 60 curated courses to develop an in-demand skill or earn a certificate or credential. These courses were selected based on a local labor market information analysis of Washington and areas of interest identified by previous diagnostic reports.

The evaluation will include, but is not limited to, analysis of the following topics:

1. The impact the workforce development efforts have on members' transition out of AmeriCorps service;

- 2. The areas within our state that have access to career development and/or workforce development services;
- Identify who benefits most from these additional services at low/no cost;
- 4. Determine if the career diagnostic, exposure to different career fields, and career coaching have been successful in increasing the numbers of historically marginalized communities engaging in career readiness.

1.2 SCOPE OF WORK

- a. Coordination of review activities with Serve WA staff and bi-weekly updates. These updates will be delivered either by telephone, e-mail, in-person, or video conference.
- b. The Contractor will meet with Serve WA staff by video conference upon their request as part of routine duties.
- c. The Contractor will identify a strong approach to this evaluation including:
 - 1) how to apply an equity lens to the evaluation;
 - 2) develop clear research/evaluation questions;
 - 3) identify data necessary for evaluation questions that will address the objectives listed in section 1.1(d);
 - 4) create a data analysis plan; and
 - 5) complete all the relevant data gathering and analysis.
- d. Coordination with Serve WA staff and its partners to collect impacts and feedback on study elements.
- e. The Contractor shall submit a final report no later than by June 30, 2023, and will meet with OFM for review and comments, at an agreed upon date and time.
- f. The final report must include the following elements:
 - 1) Executive summary;
 - 2) Introduction to the project;
 - 3) Description of Evaluation design and methods;
 - 4) The findings and results of the evaluation;
 - 5) Recommendations for future program adjustments to increase workforce development.
- g. At the request of Serve WA, the Contractor will conduct up to two presentations to stakeholders identified by Serve WA, detailing the outcome of the evaluation.
- h. Any reports due under the resulting contract are required to be in compliance with Exhibit D.

With the exception of the delivery of the final report, dates for all other deliverables will be negotiable.

Location: Virtual facilitation

1.3 MINIMUM QUALIFICATIONS

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

Minimum qualifications include:

- a. Bidder must be licensed to do business in the State of Washington or provide a commitment that it will become licensed in Washington within fifteen (15) calendar days of being selected as an Apparent Successful Bidder.
- b. Verifiable training in research methods
- c. Experience in conducting program evaluations
- d. Experience writing clear and comprehensive reports with well justified, datadriven recommendations.

1.4 CONTRACTS

OFM intends to award one (1) contract to provide the services described in this solicitation.

1.5 FUNDING

Any contract awarded as a result of this solicitation is contingent upon the availability of funding. This amount shall not exceed Seventy Five Thousand Dollars (\$75,000).

1.6 CONTRACTING WITH CURRENT OR FORMER STATE EMPLOYEES

Specific restrictions apply to contracting with current or former state employees pursuant to RCW 42.52. Bidders should familiarize themselves with the requirements prior to submitting a Proposal that includes current or former state employees.

1.7 **DEFINITIONS**

Definitions for the purposes of this solicitation include:

Agency. The Office of Financial Management (OFM) Serve Washington division is the agency of the State of Washington that is initiating this solicitation and executing any contract(s) resulting from this solicitation.

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

Bidder. Individual or company interested in the solicitation and that may or does submit a Proposal in order to attain a contract with OFM. Also known as "Proposer."

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.

Lived experience. The experiences of people to whom a social issue or combination of issues has had a direct impact.

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

OFM. The Office of Financial Management, including any divisions, units or departments within OFM.

Proposal. A formal offer submitted in response to this solicitation, also known as Bid.

Proposer. Individual or company interested in the solicitation and that may or does submit a proposal in order to attain a contract with OFM. Also known as "Bidder".

Request for Qualifications and Quotations (RFQQ). Formal solicitation document in which services needed are identified and vendors are invited to provide their qualifications and quotes to provide the services.

Solicitation. This document in which services needed are identified and vendors are invited to provide their qualifications to provide the services. Also known as "RFQQ".

1.8 ADA

OFM complies with the Americans with Disabilities Act (ADA). Bidders may contact the Solicitation Coordinator to receive this solicitation in Braille or on tape.

2. GENERAL INFORMATION

2.1 SOLICITATION COORDINATOR

a. The Solicitation Coordinator is the sole point of contact for this procurement. All communication between the Bidder and OFM upon release of this solicitation shall be with the Solicitation Coordinator, as follows:

Name	Uddy Robinson	
E-Mail Address	Uddy.Robinson@ofm.wa.gov	
Telephone	(564) 200-4499	

- b. Any other communication will be considered unofficial and non-binding on OFM and the State of Washington. Communication directed to parties other than the Solicitation Coordinator will result in disqualification of the Bidder.
- c. It is recommended that you request a read receipt whenever sending an email to the Solicitation Coordinator to ensure your email was received.

2.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Qualifications and Quotations	November 08, 2022
Bidders may submit written questions until 3:30 pm Pacific Time	November 18, 2022
OFM will issue responses to Bidder Questions on WEBS	November 23, 2022
Complaints due	November 28, 2022
Bidder must submit Proposal by 3:30 Pacific Time	December 07, 2022

OFM evaluation of Proposals	December 28, 2022
Oral Presentations, if required	December 30, 2022
OFM announces Apparent Successful Bidder (ASB) and notifies all responsive bidders via WEBS	January 4, 2023
Unsuccessful Bidders may request Debriefing until 3:30 Pacific Time	January 9, 2023
OFM holds Debriefing Conferences, if requested, at the earliest possible date, but no later than	January 11, 2023
Estimated Effective date of Contract	January 19, 2023

OFM reserves the right to revise the above schedule.

2.3 QUESTIONS AND ANSWERS

Bidders may e-mail written questions to the Solicitation 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. Bidders may only rely on written statements issued by the Solicitation Coordinator. Any oral communications are unofficial and are not binding on OFM.

2.4 SUBMISSION OF PROPOSALS

- a. The Proposal must be received by the Solicitation Coordinator no later than 3:30 pm Pacific Time, Olympia, WA, on **December 07, 2022**.
- b. Scored items are awarded points as part of the evaluation conducted by the evaluation team.
- c. Bidders are required to submit their Proposals as an attachment to an email to the Solicitation Coordinator at the email address above, on or before the proposal due date. The Bidder must identify each document and email with the identifier "RFQQ 22-1000" and the Title, "Workforce Development Evaluation". Attachments to e-mails must be in Microsoft Word or PDF format. Zipped files cannot be received by OFM and cannot be used for submission of proposals.
- d. Proposals may not be transmitted using facsimile transmission.
- e. Late proposals will not be accepted and will be automatically disqualified from further consideration.
- f. All proposals and any accompanying documentation become the property of the OFM and will not be returned.

2.5 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

- a. Proposals submitted in response to this solicitation shall become the property of OFM. All proposals received shall remain confidential until OFM announces the ASB, at which time the proposals shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW).
- b. 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, or other

state or federal law that provides for the nondisclosure of your document, 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. Marking the entire Proposal exempt from disclosure or as Proprietary Information will not be honored.

- c. If a public records request is made for the information that the Bidder has marked as "Proprietary Information," 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 the Bidder fails to obtain the court order enjoining disclosure, OFM 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, OFM shall maintain the confidentiality of the Bidder information per the court order.
- d. 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.

2.6 REVISIONS TO THE SOLICITATION

- a. In the event it becomes necessary to revise any part of this solicitation, Amendments will be published on WEBS at https://fortress.wa.gov/ga/webscust and on the OFM website at www.ofm.wa.gov. For this purpose, the published questions and answers and any other pertinent information shall be provided as an Amendment to the solicitation and will be placed on the website.
- b. If you did not receive this solicitation via WEBS, please register with WEBS at the website above in order to receive further notifications.
- c. OFM also reserves the right to cancel or to reissue the solicitation in whole or in part, prior to execution of a contract.

2.7 ACCEPTANCE OF SOLICITATION TERMS

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

2.8 RESPONSIVENESS

- a. All proposals will be reviewed by the Solicitation Coordinator to determine compliance with administrative requirements and instructions specified in this solicitation. The Bidder is specifically notified that OFM 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 exhibit to this solicitation
 - Submission of incorrect, misleading, or false information.

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

2.9 MOST FAVORABLE TERMS

- a. The State of Washington 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 State of Washington does reserve the right to contact a Bidder for clarification of its Proposal.
- b. The ASB(s) should be prepared to accept this solicitation for incorporation into a contract resulting from this solicitation. 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 State of Washington.

2.10 CONTRACT AND GENERAL TERMS AND CONDITIONS

- a. The ASB(s) will be expected to enter into a contract that will be similar to the Sample Contract, attached as Exhibit F. In no event is a Bidder to submit its own standard contract terms and conditions in response to this solicitation.
- b. The Bidder may submit exceptions as allowed in the Certifications and Assurances form, Exhibit A to this solicitation. All exceptions to the contract terms and conditions must be submitted as Track Changes to Exhibit F and attached to their Proposal. Bidder must explain the reason for each requested exception, identifying the language in Exhibit F found problematic, the reason Bidders 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 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.
- c. OFM 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 OFM's discretion.

2.11 COSTS TO PREPARE PROPOSAL

OFM will not be liable for any costs incurred by the Bidder in preparation of a proposal submitted in response to this solicitation or any other activities related to responding to this solicitation.

2.12 NO OBLIGATION TO CONTRACT

This solicitation does not obligate the State of Washington or OFM to contract for services specified herein.

2.13 REJECTION OF PROPOSALS

OFM 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 solicitation.

2.14 COMMITMENT OF FUNDS

The Director of OFM, or the Director's delegate, are the only individuals who may legally commit OFM to the expenditures of funds for a contract resulting from this solicitation. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.15 ELECTRONIC PAYMENT

The State of Washington prefers to utilize electronic payment in its transactions. Bidders who are awarded a contract as a result of this solicitation must register in the Statewide Vendor Payee Registration System. OFM 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://ofm.wa.gov/it-systems/accounting-systems/statewide-vendorpayee-services.

2.16 INSURANCE COVERAGE

- a. The Contractor is to furnish OFM with a certificate of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.
- b. The Contractor shall, at Contractor's 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 OFM within fifteen (15) days of the contract effective date.
- c. 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, OFM will assume that the Bidder is able to meet the requirements.

d. 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.
- (2) Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.
- (3) 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.

- e. **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.
- f. <u>Additional Provisions</u>. The above insurance shall include the following provisions:
 - (1) Additional Insured. The State of Washington, OFM, 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. OFM 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 nonpayment 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 nonpayment of premium, the state shall be given 10 days advance notice of cancellation.
 - (3) **Identification.** Policy must reference the state's contract number and OFM 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 the 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.
- g. 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.

2.17 COMPLAINT PROCESS

- a. This procedure is available to potential Bidders who are contemplating submitting a bid in response to this solicitation. 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.
- b. 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.
- c. All complaints must be in writing and signed by the complaining party or an authorized Agent. The complaint must be sent to the Solicitation Coordinator, or designee, by the date set forth in the Procurement Schedule and must clearly articulate the basis for the complaint. The Bidder submitting the complaint must also include a proposed remedy.
- d. Upon receipt of a complaint, a review will be held by OFM. The OFM Solicitation 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.
- e. The complaint process does not include an appeal process.

2.18 MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with RCW 39.19, 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 Minority and Women's Business Enterprises 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 goals for certified **Minority Business Enterprises** is 10% and for certified **Women's Business Enterprises**, 6%, for this type of project. These goals are voluntary. Bidders may contact OMWBE at (360) 753-9693 to obtain information on certified firms.

3. PROPOSAL CONTENTS

The Proposal must be written in English. The three major sections of the Proposal must be submitted in the order below with the same headings. This will not only be helpful to the evaluators of the Proposal, but should assist the Bidder in preparing a thorough response.

3.1. Administrative Requirements (Section 1 of Proposal)

- a. <u>Letter of Submittal</u>. The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A) 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 solicitation. The Letter of Submittal shall contain the following information:
 - (1) Name, address, principal place of business, telephone number, fax number, and e-mail address of the legal entity or the individual with whom the contract would be written.
 - (2) The name and email address of the contact person for this solicitation.
 - (3) Legal status of Bidder (sole proprietorship, partnership, corporation, etc.) and the year the entity was established to do business as it now substantially exists.
 - (4) Name, address, and telephone number of each principal officer (President, Vice-President, Treasurer, Chairperson of the Board of Directors, etc.)
 - (5) Federal Employer Tax Identification number or Social Security number.
 - (6) The Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue. If the Bidder does not have a UBI number, the Bidder must state that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparent Successful Bidder.
 - (7) Location of the facility from which the Bidder would operate.
 - (8) Indicate how many employees are with the firm.
 - (9) Identify any state employees or former state employees employed by the Bidder or on the Bidder's governing board as of the date of the Proposal. Include their position and responsibilities within the Bidder's organization. If following a review of this information, it is determined by OFM that a conflict of interest exists, the Bidder may be disqualified from further consideration for the award of a contract.
 - (10) If the Bidder's staff or subcontractor's staff was an employee of the State of Washington during the past 24 months, or is currently a Washington state employee, identify the individual by name, the agency previously or currently employed by, job title or position held, and separation date.
 - (11) If the Bidder has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Bidder's non-performance or poor performance and the issue of performance was either (a) not litigated due

- to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
- (12) Submit full details of the terms for default, including the other party's name, address, and phone number. Present the Bidder's position on the matter. OFM will evaluate the facts and may, at its sole discretion, reject the Proposal on the grounds of the experience. If no such termination for default has been experienced by the Bidder in the past five years, so indicate.
- (13) A list of all solicitation Amendments downloaded by the Bidder from WEBS and listed in order by Amendment number and date. If there are no solicitation Amendments, the Bidder must include a statement to that effect.
- (14) A statement substantiating that the person who signs the letter is authorized to contractually bind the Bidder's firm.
- (15) A statement substantiating that the Bidder meets all the Minimum Qualifications as listed in **Minimum Qualifications** Section.
- (16) Identification of the page numbers on the Bidder's Proposal that are marked "Proprietary Information".
- b. <u>Bidder Certification and Assurances Form.</u> Bidders must submit a completed Bidder Certification and Assurances Form, Exhibit A. Please sign and include any attachments that are necessary. Failure to submit a signed Certification and Assurances Form will result in disqualification.
- c. <u>Wage Theft Certification</u>. Bidders must submit a completed and executed Wage Theft Certification Form, Exhibit B. Failure to submit will result in disqualification.
- d. <u>Executive Order 18-03 Contractor Certification (5 points)</u>. Bidders must submit a completed and executed Executive Order 18-03 Certification Form, Exhibit C. Failure to submit will result in disqualification.
- e. <u>OMWBE Certification</u>. 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).
- f. <u>Veteran's Certification</u>. If you are certified as a veteran-owned firm include proof of certification issued by the Washington State Department of Veterans Affairs.
- g. <u>References</u>. List names, addresses, telephone numbers, and e-mail addresses of three (3) business references for the Bidder and three (3) business references for the lead staff person for whom work has been accomplished and briefly describe the type of service provided. Do not include current OFM staff as references. By submitting a proposal in response to this solicitation, the Bidder and team members grant permission to OFM to contact these references and others, who from OFM's perspective, may have pertinent information. OFM may or may not, at OFM's discretion, contact references. OFM may evaluate references at OFM's discretion.

3.2. Qualifications/Experience (Section 2 of Proposal)

<u>General Requirements</u>: This section of the Proposal must contain information that will demonstrate to the evaluation committee the Bidder's understanding of the types of services proposed, the Bidder's ability to accomplish them, and the ability to meet tight timeframes. This section must also demonstrate the capabilities of the Bidder's staff to perform the services.

<u>Numbering of Responses</u>. Please number each response so that it corresponds to the question number. *The response must begin with a restatement of the question followed by the Bidder's response to the question.* A reference to another section will not suffice, each answer must stand alone.

<u>Attachments</u>: Attachments must be labeled and the question number to which it responds must be indicated.

<u>Points Awarded for Responses</u>. The number in parentheses after each question or requirement represents the maximum number of points that may be awarded for the Bidder's response to that question or requirement.

a. Firm Qualifications and Experience (45 points)

- (1) Describe the firm's recent experience (within the last 5 years) with evaluations.
- (2) Describe the firm's recent experience (within the last 5 years) with national service programming such as AmeriCorps.
- (3) Describe the firm's recent experience (within the last 5 years) with applying an equity lens to your evaluation work.
- (4) Describe the firm's recent experience or training in (within the last 5 years) with workforce development.
- (5) Describe the firm's experience writing clear and comprehensive reports with well justified, data-driven recommendations.

b. Staffing Qualifications and Experience (45 points)

- (1) Provide a description of typical project team structure and internal controls to be used during the course of the project, including any subcontractors.
- (2) Provide the name and a resume of the person who will be the lead contact for this evaluation.
- (3) Provide names and resumes for other staff, which includes information on the individuals' particular skills related to evaluations; education, experience, significant accomplishments and any other pertinent information.

c. Work Plan

Submit a Work Plan describing how you would accomplish the Scope of Work.

3.3. Quotation/Budget Section (Section 3 of Proposal) (10 points)

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 RFQQ. Bidders are encouraged, however, to submit proposals which are consistent with state government efforts to conserve resources.

<u>Points Awarded for Responses</u>. The number in parentheses represents the maximum number of points that may be awarded for the Bidder's response to this quotation section.

- a. Bidder should provide a **firm fixed price** for completing the defined Objectives and Scope of Work. The total bid for all work included in the Bidder's Proposal may not exceed \$75,000.00.
- b. The project budget must include a breakdown of costs identifying the number of hours to be provided by each staff member and the hourly rate for each. Where applicable, include administrative costs, travel costs, and any other expenses necessary to accomplish the objectives and produce the deliverables under the contract.
- 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.

3.4. Diverse Business Inclusion Plan (for Subcontractors, if used)

To be considered responsive, Bidders who intend to use subcontractors, if awarded a Contract, must submit the Diverse Business Inclusion Plan Form, Exhibit E, as part of their bid. 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 <u>NOT</u> required if bidder does not intend to use subcontractors.

In accordance with <u>RCW 39.19</u>, the State of Washington encourages participation in all of its contracts by OMWBE certified firms. In accordance with <u>RCW 43.60A.200</u>, the State of Washington encourages participation in all of its contracts from firms certified by WDVA.

4. EVALUATION AND SELECTION

4.1. EVALUATION PROCEDURE

- a. 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 OFM, which will determine the highest-scoring Bidder for selection as the Apparent Successful Bidder.
- b. The Solicitation Coordinator reserves the right to contact Bidders for clarification of any portion of the Bidder's Proposal.

4.2. 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, OFM 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 *Exhibit C* – *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.

4.3. SCORING

a. The following are the maximum points that will be assigned to the Proposals for bid evaluation purposes:

Scored Item	Maximum Points
Firm Qualifications/Experience	45
Staff Qualifications/Experience	45
Quotation/Budget	10
Executive Order 18-03	5
Subtotal	105
Oral Presentation (optional)	50
Total Maximum Points	155

- b. Proposals will be consensus scored by evaluators. The evaluators will agree on the score for each scored item. Then the scores for all the scored items will be added together to determine the Bidder's total score.
- c. OFM reserves the right to award the contract to the Bidder whose Proposal is deemed to be in the best interest of OFM and the State of Washington.
- d. Quotation scoring

The lowest quote will receive the full 10 points. All other quotes will be awarded by dividing the lowest responsive quote by your total budget cost. The result of this calculation will be multiplied by the 10 points available.

Example

Lowest bid = \$60,000.00

Bidder's bid = \$75,000.00

60,000.00 divided by 75,000 = 0.80

 0.80×10 points possible = 8 points

8 points would be awarded for the quotation score.

4.4. ORAL PRESENTATIONS MAY BE REQUIRED

Oral presentations may be utilized in selecting the winning proposal. OFM, at its sole discretion, may elect to select the top-scoring firm(s) from the written evaluation for an oral presentation. OFM 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.

4.5. FINAL DETERMINATION OF APPARENT SUCCESSFUL BIDDERS

- a. OFM program staff and/or management may conduct a final review of the evaluation and scoring of finalist(s).
- b. In this final review, OFM may consider past or current performance of any OFM

- contracts by a finalist(s), and any experience of the program or OFM in working with a finalist(s) under any past or current contract with OFM.
- c. In doing so, OFM management shall be guided, but not bound, by the scores awarded by the evaluators. Program staff and OFM management shall determine which Proposals reviewed during this final selection process will best meet the needs of OFM and, specifically, the needs of OFM.
- 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 OFM selected a Bidder with a lower final score.

4.6. NOTIFICATION TO BIDDERS

Announcement of the ASB will be made via WEBS upon completion of the evaluation process. All Bidders who responded to this solicitation will receive an e-mail from WEBS notifying them of the ASB.

4.7. DEBRIEFING OF UNSUCCESSFUL BIDDERS

- a. Any Bidder 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.

4.8. PROTEST PROCEDURE

Protests may be made only by Bidders who submitted a response to this solicitation and participated in a debriefing conference. Upon completing the debriefing conference, the Bidder is allowed five (5) business days to file a protest of the results with the Solicitation Coordinator. Protests must be received by the Solicitation Coordinator no later than 5:00 pm, local time in Olympia, Washington on the fifth business day following the debriefing. Protests may be submitted by e-mail but must then be followed by the document with an original signature.

Bidders protesting this solicitation 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 solicitation.

All protests must be in writing, addressed to the Solicitation Coordinator, and signed by the protesting party or an authorized Agent. The protest must state the solicitation 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 solicitation or OFM 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 the Solicitation Coordinator will immediately forward it to an OFM Protest Officer, who will be an employee delegated by the Director who was not involved in the solicitation. The Protest Officer 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 Solicitation Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold OFM's action; or
- Find only technical or harmless errors in OFM's procurement 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 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 OFM determines that the protest is without merit, OFM will enter into contracts with the Apparent Successful Bidder(s). If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

5. EXHIBITS

- Exhibit A Certifications and Assurances
- Exhibit B Wage & Theft Certification
- Exhibit C Executive Order 18-03 Contractor Certification
- Exhibit D Office of Financial Management Style, Design and Graphics Guidelines for Contractors
- Exhibit E Diverse Business Inclusion Plan Form
- Exhibit F Sample Contract

Exhibit A CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

- 1. I/we declare that all answers and statements made in the proposal are true and correct.
- 2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
- 3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by OFM without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
- 4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
- 5. I/we understand that the OFM will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of the OFM, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
- 6. Unless otherwise required by law, the prices and/or cost data, if any, which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other Proposer or to any competitor
- 7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract with general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
- 8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
- 9. I/we grant OFM the right to contact references and others, who may have pertinent information regarding the ability of the Bidder and the lead staff person to perform the services contemplated in this procurement.
- 10. If any staff member(s) who will perform work on this contract has retired from the State of Washington under the provisions of the 2008 Early Retirement Factors legislation, his/her name(s) is noted on a separately attached page.

We *(circle one)* **are/are not** submitting proposed Contract exceptions (See Section 2.10, Contract with General Terms and Conditions). If Contract exceptions are being submitted, I/we have attached them to this form.

On behalf of the Bidder submitting this proposal, my name below attests to the accuracy of the above statements.

Signature of Bidder	
-	
Title	Date

Exhibit B Contractor Certification Wage Theft Prevention – Responsible Bidder Criteria

Prior to awarding a contract, agencies are required to determine that a bidder is a 'responsible bidder.' See RCW 39.26.160(2) & (4). Pursuant to legislative enactment in 2017, the responsible bidder criteria include a contractor certification that the contractor has not willfully violated Washington's wage laws. See Chap. 258, 2017 Laws (enacting SSB 5301).

22-1000 - Workforce Development Evaluation **OFM Procurement Number:** I hereby certify, on behalf of the organization/organizations identified below, as follows (check one): □ No WAGE VIOLATIONS. This organization and, in cases of joint proposals, the members of our coalition, has NOT been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in RCW 49.48.082, any provision of RCW chapters 49.46, 49.48, or 49.52 within three (3) years prior to the date of the above-referenced procurement solicitation date. OR □ VIOLATIONS OF WAGE LAWS. This organization and, in cases of joint proposals, the members of our coalition, has been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in RCW 49.48.082, a provision of RCW chapters 49.46, 49.48, or 49.52 within three (3) years prior to the date of the above-referenced procurement solicitation date. I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein. ORGANIZATION NAME: Name of Bidder – Print full legal entity name of organization By: Signature of authorized person Print Name of person making certifications for firm

Return to Solicitation Coordinator with bid response. Failure to submit will result in disqualification.

Place:

Print city and state where signed

Title:

Date:

Title of person signing certificate

EXHIBIT C CONTRACTOR CERTIFICATION EXECUTIVE ORDER 18-03 – WORKERS' RIGHTS WASHINGTON STATE GOODS & SERVICES CONTRACTS

Pursuant to the Washington State Governor's Executive Order 18-03 (dated June 12, 2018), the Washington State Office for Regulatory Innovation and Assistance is seeking to contract with qualified entities and business owners who certify that their employees are not, as a condition of employment, subject to mandatory individual arbitration clauses and class or collective action waivers.

OFM Procurement Number: 22-1000 – Workforce Development Evaluation

I hereby ce	ertify, on behalf of the firm identified be	elow, as follows (check one):	
	ACTION WAIVERS FOR EMPLOYEES.	ATION CLAUSES AND CLASS OR COLLECTIVE This firm does NOT require its employees, as or agree to mandatory individual arbitration waivers.	
	0	R	
	MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES. This firm requires its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.		
certification		the laws of the State of Washington, that the tall am authorized to make these certifications or	
FIRM NAME	::Name of Contractor/Bidder – Print full le	egal entity name of firm	
By: Sig	gnature of authorized person	Print Name of person making certifications for firm	
Title:	tle of person signing certificate	Place: Print city and state where signed	
Date:			

Return to Solicitation Coordinator with bid response. Failure to submit will result in disqualification.

Exhibit D

Office of Financial Management

Style, Design and Graphics Guidelines for Contractors

Contractors are required to submit materials that adhere to the Office of Financial Management's style guide and to the following standards. Materials that do not meet style, design or graphic guidelines will be returned to the contractor for correction. We use these guidelines to assure quality and consistency among the many reports we distribute and post online on behalf of the Governor's Office and the Office of Financial Management.

File formats

All final documents must be submitted in formats that are editable in either Microsoft or Adobe software.

Source files

All sources files become the property of OFM and will be provided to OFM staff upon request.

ADA-compliance and accessibility

Information posted on public websites is required to meet federal Americans with Disabilities Act standards (see www.ada.gov for more information) and must be submitted to OFM in an accessible (ADA-compliant) format. Image files (.jpg, .tiff, .png) are not accessible; neither are text or graphic files that are created by scanning.

Written style

OFM uses the Associated Press Stylebook as its reference guide. For style guidance specific to OFM, see the OFM style guide.

Executive summary

OFM strongly encourages that reports be submitted with a concise executive summary that explains the reason the report is being submitted (such as a budget proviso), a brief description of methodology (if pertinent), key findings and recommendations.

Fonts

Use standard Microsoft fonts. OFM's preferred fonts are: Garamond font, 12-point size, for body of text.

Arial narrow font, 10-point size, for tables and charts.

Arial font, 16- and 14-point size bold, for headings, titles and subtitles.

Images

Images should be used appropriately for illustrative purposes, and follow ADA guidelines. Photos, drawings, maps and similar images are not ADA-compliant unless they include alternative text that describes the content and information conveyed.

Tables

Tables can either be created in Word or imported from Excel in an accessible format, not as a screenshot.

Keep tables on one page — do not split among pages if they can be kept intact. If a table must spread across multiple pages, repeat the header on each page.

Charts

Create charts in PowerPoint, Excel or Illustrator and import into a Word document in an accessible format. Ensure data is embedded in the chart if possible (not in a separate Excel file) so they can be accessed or edited if needed.

Reduce unnecessary chart elements such as gridlines, background colors, shadowing, 3D, borders, excess zeros and redundant text.

Avoid using color alone to convey meaning in charts – provide emphasis with text, identifiers, symbols or patterns. This ensures accessibility and enables content to be understood when printed in black and white.

To ensure charts are ADA-compliant and can be understood by those with a visual disability using screen reader software, add alternative text to each chart that describes the key information conveyed in it. Also include the chart data in a table, either below the chart or in an appendix, with a link to the table from the chart caption or description.

Logos

Your firm's logo may appear on the front cover, title page and/or back cover pages only. Logos are discouraged on the inside pages, or in headers and footers.

Contact

If you have questions about these guidelines, contact: Erin Cahill, OFM Communications

erin.cahill@ofm.wa.gov

Exhibit E

Diverse Business Inclusion Plan Form

1. Anticipated Diverse Business Participation (Goals)

List the anticipated diverse business participation goals for participation of subcontractors in the Contract, if awarded. Bidders may list any goal amount. These goals are aspirational to include Diverse Business subcontractors.

State certification category	Agency Goals	Anticipated Percent of Contract Amount (Goals)
Minority-owned business	10%	
Women-owned business	6%	
Veteran-owned business	5%	
Small/mini/micro business	5%	

2. The Diverse Business Subcontracting list

Provide the company information of the relevant Diverse Business subcontractors you anticipate utilizing on this Contract, if awarded. Please identify the names of the companies as they are listed in the state registration system and for Minority, Women, and Veteran owned businesses, provide relevant state certification numbers.

State certification category	List of Companies	Certification number, if applicable
Minority-owned businesses		
Women-owned businesses		
Veteran-owned businesses		
Small/mini/micro businesses		

Email:

- 3. Describe your plan to meet or exceed the voluntary inclusion goals including outreach. Response:
- 4. Identify your primary contact for the inclusion goals.

 Name: Phone:
- 5. Describe how you will ensure prompt payment of all subcontractors. Response:
- 6. Describe your methods for outreach to small and diverse businesses to inform them of opportunities to work as subcontractors.
 Response:

OFM will review the submitted inclusion plan for a genuine effort and the maximum opportunity to contribute toward OFM's aspirational goals. Awarded bidders will meet with OFM annually regarding the inclusion plans aspirational goals and outreach efforts.

Bidder commits to a make a genuine effort to achieve the proposed subcontract amounts with diverse business subcontractors as stated above. Bidder will develop a comprehensive outreach strategy that will engage Diverse Businesses registered with the state of Washington in the Washington State Electronic Business Solution (WEBS).