**STATE OF WASHINGTON**

**DEPARTMENT OF COMMERCE**

**REQUEST FOR PROPOSALS (RFP)  
RFP NO. COM-12220-12-19-18**

**PROJECT TITLE: ORGANIZATIONAL ASSESSMENT OF CRM READINESS**

**PROPOSAL DUE DATE: January 25, 2019, 4:30 pm**, Pacific Daylight Time, Olympia, Washington, USA.

Only E-mailed bids accepted.

**ESTIMATED TIME PERIOD FOR CONTRACT: March 1, 2019 to June 30, 2019**

The Agency reserves the right to extend the contract at the sole discretion of the Agency.

**CONSULTANT ELIGIBILITY:** This procurement is only open to those consultants that satisfy the minimum qualifications stated herein, and that are available for work in Washington State.

**CONTENTS OF THE REQUEST FOR PROPOSALS:**

1. Introduction
2. General Information for Consultants
3. Proposal Contents
4. Evaluation and Award
5. Exhibits

A. Certifications and Assurances

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1. **INTRODUCTION**
   1. **PURPOSE AND BACKGROUND**

The Washington State, Department of Commerce (hereafter "Commerce”) is initiating this Request for Proposals (RFP) to solicit proposals from firms interested in performing an organizational readiness assessment for implementation of a Customer Relationship Management software system.

Commerce is a state agency that touches every aspect of community and economic and community development: planning, infrastructure, energy, public facilities, housing, public safety and crime victims, international trade, business services and more. Commerce works closely with local governments, businesses and civic leaders throughout the state to strengthen communities, so all residents may thrive and prosper. The agency’s core functions fall into four broad categories:

* **Serving Communities** – A strong community is essential for economic prosperity and self-sufficient people.
* **Building Infrastructure** – Healthy communities need modern public infrastructure to maintain a good quality of life that attracts people to live, work and play there.
* **Growing the Economy** – Creating a prosperous, sustainable economy goes hand in hand with building world-class communities.
* **Promoting Washington** – We create new economic opportunities for communities by promoting the state at home and abroad, encouraging companies and investors from all over the world to “Choose Washington” for doing business.

The agency’s responsibilities have expanded and contracted over the past 26 years to meet the needs and priorities of state government and the people it serves. The department passes through approximately $1.2 billion a biennium in grant and loan contracts to over 3,800 customers to help meet those needs. Today the department manages over 100 programs with a staff of about 310 dedicated people. Detailed information about Commerce's programs is available online in our resource book at <http://www.commerce.wa.gov/wp-content/uploads/2017/11/2019ResourceBook-Final.pdf>

* 1. **COMMERCE’S BUSINESS PROBLEM**

Commerce's 100-plus programs have independent grant and contract relationships with many entities. The agency deals with local agencies and publicly funded nonprofit entities across the state. Many of these programs have contact and business relationships with the same entities, but there is little coordination at the program level and often only general awareness at the executive level of these relationships. We want to be able to know which contacts Commerce has in each organization and what interactions are in place at any given time with those entities.

We believe that a CRM solution could help us in several areas:

***Outreach staff***

Commerce has staff whose job is to conduct outreach activities across the state with key local government and nonprofit partners. These staff serve in a role that markets Commerce across its programs and provides a single, unified face of the agency to our clients. We want a way to capture their interactions and make sure that our various programs are responding to issues raised as part of these outreach contacts. We also need a software system that can help us identify gaps in service across the state so we can become more proactive and strategic with our limited resources.

***Program monitoring***

Some of Commerce’s programs conduct a monitoring function, tracking effectiveness of the funds that Commerce invests and making sure that recipients are using funding within the terms of the grant and consistent with applicable rules and regulations. We want a way to make the scheduling, tracking and coordination of monitoring activities easier and to make sure that issues raised are communicated and captured in a central location available to all Commerce programs.

***Common Funding Tool***

Each biennium, over $800 million in federal and state funds are passed from Commerce to local governments, non-profit organizations, and other entities to fund programs, projects and special initiatives. Currently, funding requests are largely unique and are based on needs of individual funding programs. This leads to information silos lacking visibility across the agency. This project proposes to standardize a common subset of information common to all applications. This information would be tracked in an agency wide system rather than program-specific databases and spreadsheets.

An agency-wide agreement on standard data elements and a common repository would result in:

* Information in this tool talking to other agency systems, such as CMS, that can tell a story either through a single or a combination of awards
* Useful reports about funding requests and funding awards from the program-specific level to the agency level.

There are other, similar use cases available across the agency for a CRM platform that would allow the agency to develop low-code or no-code solutions (with minimal development work) to provide business process automation relatively quickly.

The Department intends to award one contract to provide the services described in this RFP.

* 1. **OBJECTIVES AND SCOPE OF WORK**

The proposed vendor will be tasked with assessing Commerce, including program readiness, requirements, skills needed, work flow processes, organizational structure and dynamics, and outcome measurements. The vendor will review current policies and procedures in place to ensure the proper stewardship of state resources.

The engagement will include, but will not be limited to, tasks and deliverables such as the following:

**The first phase (mapping): What is our current state?**

Gain an understanding of Organizational Dynamics:

* Is there basic customer segmentation and alignment that would allow CRM projects to be designed around different customer groups to achieve goals that are unique to these groups? Or, is there a need to do additional advance work to segment customers and stakeholders prior to proceeding with a CRM effort?
* What are agency competencies with respect to managing the organizational change necessary to succeed with a CRM implementation effort?
* Are the business units that own customer processes themselves aligned with each other so that process and data integration are not barriers in implementing CRM projects?
* How many users are directly involved in customer interactions?
* What is senior management’s opinion and/or understanding of CRM? Do they align?
* Do end users seem interested in adopting a CRM Suite, or are they apathetic to existing and proposed solutions?

**The second phase (assessment): What is working well? What gaps and barriers exist?**

Challenges to address:

* Assess Commerce’s starting point and build gap analysis.
* Discuss with senior management to identify goals, gaps in perspectives and understandings.
* Identify risks.
* Identify all areas of our business that touch the customer.
* Identify all of the business processes that manage the touch points with the customer.
* Document those business processes and key data elements.
* Educate users on the use of a CRM system with a focus on how that system will deliver value to their daily work lives.
* Educate how it will maximize efficiency and effectiveness in managing relationships with customers.

**The third and final phase (recommendations): What is our action plan?**

Based on the consultant’s understanding and assessment, make recommendations to:

* Expand operational effectiveness and productivity
* Empower Commerce to improve customer service delivery
* Augment accessibility and quality of information for decision-making support
* Retool or replace inefficient customer relationship practices
* Enable e-government initiatives, including state-of-the-art customer service and web self-service to provide 24/7 access to key Commerce functions
* Achieve consistency in addressing customer inquiries
* Enrich collaboration and interdepartmental communication
* Provide a means of measuring effectiveness
* Develop comprehensive reporting capabilities
* Implement a CRM solution that provides Commerce with core CRM capabilities without trying to expand a CRM system for things outside the CRM “sweet spot”; in other words, we do not want to leverage CRM for every process automation need, but to leverage it for those things that can be accomplished with minimal configuration and customization.

Integrate a centralized approach to customer relations that will:

* Retire outdated legacy and back office systems and tools
* Approach decisions holistically, developing project policies, systems and solutions with the participation of representatives from all departments and divisions
* Require adherence to adopted practices in all situations except mission-critical deviations, which must be approved by the CRM Executive Steering Committee
* Develop ongoing training programs so that all Commerce staff are knowledgeable about CRM practices and system functions
* Commit staffing and financial resources to ensure the success of the project during development, implementation and after installation
* Recognizing Commerce’s state of readiness (see Phases 1 and 2 above), develop a plan and approach that produces substantial business value while still structuring the project to reduce implementation risk and cost.
  1. **Deliverables**

Contractor will produce a Findings and Recommendations Report answering all bullet points in section 1.3 to include substantial narratives that clearly address each assessment point, showing all data points discovered to support findings. Prepare an action plan detailing next steps in moving toward a recommended solution.

**1.5 MINIMUM QUALIFICATIONS**

Minimum qualifications include:

* Vendor is 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 Contractor.
* Vendor demonstrates at least 5 years experience with CRM consulting, readiness assessments and implementation planning
  1. **INELIGIBILITY FOR CRM IMPLEMENTATION WORK**

**Any vendor contracted to produce the deliverables as a result of this RFP will not be eligible to perform systems integration work related to any subsequent CRM effort.**

**FUNDING**

Commerce anticipates a budget of sixty thousand dollars ($60,000) for this project.

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

* 1. **PERIOD OF PERFORMANCE**

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about March 1, 2019 and to end on June 30, 2019. Amendments extending the period of performance, if any, shall be at the sole discretion of the Department.

* 1. **CONTRACTING WITH 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. Proposers should familiarize themselves with the requirements prior to submitting a proposal that includes current or former state employees.

* 1. **DEFINITIONS**

Definitions for the purposes of this RFP include:

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

**Consultant –** Individual or company interested in the RFP and that may or does submit a proposal in order to attain a contract with the Department.

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

**Department –** The Department of Commerce is the agency of the state of Washington that is issuing this RFP.

**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 Department.

**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 consultant community to suggest various approaches to meet the need at a given price.

1. **GENERAL INFORMATION FOR CONSULTANTS**

**2.1. RFP COORDINATOR**

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

|  |  |
| --- | --- |
| Name | Sarah Champion |
| E-Mail Address | Sarah.Champion@commerce.wa.gov |
| Phone Number | (360) 764-3725 |

Any other communication will be considered unofficial and non-binding on the Department. Consultants 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 Consultant.

**2.2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES**

|  |  |
| --- | --- |
| Issue Request for Proposals | December 19, 2018 |
| Questions Due | January 4, 2019 |
| Answers Posted No Later Than | January 9, 2019 |
| Proposals due | January 25, 2019 |
| Evaluate proposals | January 28, 2019 |
| Conduct oral interviews with finalists | February 4, 2019 – February 8, 2019 |
| Announce “Apparent Successful Contractor” and send notification via e-mail to unsuccessful proposers | February 15, 2019 |
| Begin contract work | March 1, 2019 |

The Department reserves the right to revise the above schedule.

**2.3 SUBMISSION OF PROPOSALS  
ELECTRONIC PROPOSALS:**

Proposals must be **received by the RFP Coordinator** no later than 4:30 p.m., Pacific Daylight Time, in Olympia, Washington, on January 25, 2019.

Proposals must be submitted electronically as an attachment to an e-mail to the RFP Coordinator, at the e-mail address listed in Section 2.1. Attachments to e-mail shall be in Microsoft Word format or PDF. Zipped files cannot be received by the Department and cannot be used for submission of proposals. The cover submittal letter and the Certifications and Assurances form must have a scanned signature of the individual within the organization authorized to bind the Consultant to the offer. The Department does not assume responsibility for problems with Consultant’s e-mail. If the Department’s email is not working, appropriate allowances will be made.

Proposals may not be transmitted using facsimile transmission.

Consultants should allow sufficient time to ensure timely receipt of the proposal by the RFP Coordinator. Late proposals will not be accepted and will be automatically disqualified from further consideration, unless the Department’s e-mail is found to be at fault. All proposals and any accompanying documentation become the property of the Department and will not be returned.

**2.4 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE**

Proposals submitted in response to this competitive procurement shall become the property of the Department. All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Director of the Department, or his Designee, and the apparent successful Contractor; thereafter, the proposals shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW).

Any information in the proposal that the Consultant 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 Consultant 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.

If a public records request is made for the information that the Consultant has marked as "Proprietary Information," the Department will notify the Consultant of the request and of the date that the records will be released to the requester unless the Consultant obtains a court order enjoining that disclosure. If the Consultant fails to obtain the court order enjoining disclosure, the Department will release the requested information on the date specified. If a Consultant 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, the Department shall maintain the confidentiality of the Consultant's information per the court order.

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 RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

**2.5 REVISIONS TO THE RFP**

In the event it becomes necessary to revise any part of this RFP, addenda will be provided via e-mail to all individuals, who have made the RFP Coordinator aware of their interest. Addenda will also be published on Washington’s Electronic Bid System (WEBS). The website can be located at <https://fortress.wa.gov/ga/webs/>. For this purpose, the published questions and answers and any other pertinent information shall be provided as an addendum to the RFP and will be placed on the website.

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

**2.6 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 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.

**2.7 ACCEPTANCE PERIOD**

Proposals must provide 60 days for acceptance by Department from the due date for receipt of proposals.

**2.8 RESPONSIVENESS**

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

The Department also reserves the right at its sole discretion to waive minor administrative irregularities.

**2.9 COMPLAINT PROCESS**

Vendors may submit a complaint to the Department based on any of following:

1. The solicitation unnecessarily restricts competition;
2. The solicitation evaluation or scoring process is unfair; or
3. The solicitation requirements are inadequate or insufficient to prepare a response.

A complaint may be submitted to the Department at any time prior to 5 days before the bid response deadline. The complaint must meet the following requirements:

1. The complaint must be in writing;
2. The complaint must be sent to the RFP coordinator in a timely manner;
3. The complaint should clearly articulate the basis for the complaint; and
4. The complaint should include a proposed remedy.

The RFP coordinator will respond to the complaint in writing. The response to the complaint and any changes to the solicitation will be posted on WEBS. The Director of the Department will be notified of all complaints and will be provided a copy of the Department’s response. The complaint may not be raised again during the protest period. The Department’s action or inaction in response to the complaint will be final. There will be no appeal process.

**2.10 MOST FAVORABLE TERMS**

The Department 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 Consultant can propose. There will be no best and final offer procedure. The Department does reserve the right to contact a Consultant for clarification of its proposal.

The Apparent Successful Contractor 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

Consultant’s proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to the Department.

**2.11 COSTS TO PROPOSE**

The Department will not be liable for any costs incurred by the Consultant 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

**2.12 NO OBLIGATION TO CONTRACT**

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

**2.13 REJECTION OF PROPOSALS**

The Department 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.

**2.14 COMMITMENT OF FUNDS**

The Director of the Department or his delegate is the only individual who may legally commit the Department 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.

**2.15 INSURANCE COVERAGE**

1. **Insurance Required**

Prior to commencement of any activity under this Contract, Contractor, at Contractor’ssole expense,shall obtain and maintain in full force and effect during the term of this Contract and during any other period during which Contractoris acting pursuant to this Contract, the insurance coverages set forth herein on Contractor’soperations and activities. Failures to purchase, maintain, and provide evidence of the required insurance shall constitute material default.

1. **Insurer**. Contractor shall acquire such insurance from an insurance carrier or carriers licensed to conduct business in the State of Washington and having a rating of A-, Class VII or better, in the most recently published edition of Best’s Reports.
2. **Evidence of Coverage**. Contractor shall furnish to Purchaser copies of certificates and endorsements of all required insurance within thirty (30) calendar days of this Contract’s effective date, and copies of renewal certificates and endorsements of all required insurance within thirty (30) calendar days after the renewal date. These certificates of insurance must expressly indicate compliance with each and every insurance requirement specified in this exhibit. Such policies also shall reference this Contract number.
3. **Advance Notice of Revocation**. Such policies shall have a condition that they not be revoked by the insurer until forty-five (45) calendar days after notice of intended revocation thereof shall have been given to Purchaser by the insurer.
4. **Cancellation**. In the event of cancellation, non-renewal, revocation, or other termination of any insurance coverage required by this Contract, Contractor shall provide written notice of such to Purchaser within one (1) business day of Contractor’s receipt of such notice.
5. **Additional Insured**. With the exception of the Professional Liability, Automobile Liability, and Workers Compensation coverages, the Purchaser shall be named as an Additional Insured and Contractor shall provide a copy of the policy endorsement(s) designating Purchaser as an additional named insured.
6. **Primary Insurance**. All insurance provided by Contractor shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the Purchaser and shall include a severability of interests (cross-liability) provision.
7. **Subcontractors**. Contractor shall include all subcontractors as insureds under all required insurance policies, or shall furnish separate certificates of insurance and endorsements for each subcontractor. Subcontractor(s) shall comply fully with all insurance requirements stated herein. Failure of subcontractor(s) to comply with insurance requirements does not limit Contractor’s liability or responsibility.
8. **Contractor’s Liability**. By requiring insurance herein, Purchaser does not represent that coverage and limits will be adequate to protect Contractor. Such coverage and limits shall not limit Contractor’s liability under this Contract.
9. **Insurance Coverage: Minimum Acceptable Insurance Policy Limits**

The minimum acceptable limits shall be as stated below, with no deductible for each of the following categories:

1. **Commercial General Liability Insurance (including Employers Liability Coverage)**. Coverage form shall be equivalent to form CG00001. GL limits of liability shall be least $1,000,000 per occurrence and $2,000,000 annual aggregate. Employers Liability limits shall be Bodily Injury by Accident: $1,000,000 each accident/Bodily Injury by Disease: $1,000,000 policy limit/Bodily Injury by Disease: $1,000,000 each employee.
2. **Property Insurance**. Contractor shall provide evidence of “All-Risk” property insurance including coverage for Earthquake and Flood for all locations where State of Washington data is held. This coverage shall include all Computer Property. This insurance shall also include coverage for Business Interruption and Extra Expense that extends to the loss of Computer Property. Limits shall be declared and subject to review and approval by the state of Washington.
3. **Umbrella Policy**. Providing excess limits over the primary policies in an amount not less than $2 million.
4. **Workers’ Compensation or Industrial Accident Insurance**. Statutory Workers Compensation insurance for all employees.
5. **Cyber Liability Insurance**. Limits of liability shall not be less than $1,000,000 per claim for First and Third Party coverage. Contractors who offer a Software-as-a-Service type solution will be required to provide Cyber Liability Insurance sufficient to cover the costs of a potential data security breach involving all SaaS customer’s data at any Contractor location or downstream Contractor location.
6. **Professional Liability (Errors and Omissions) Insurance**. Limits of liability shall not be less than $1,000,000 per claim and $1,000,000 annual aggregate.

**3. PROPOSAL CONTENTS**

Proposals must be written in English and submitted electronically to the RFP Coordinator in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A to this RFP);
2. Technical Proposal;
3. Management Proposal; and,
4. Cost Proposal.

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Consultant in preparing a thorough response.

Items marked “mandatory” must be included as part of the proposal for the proposal to be considered responsive, however, these items are not scored. Items marked “scored” are those that are awarded points as part of the evaluation conducted by the evaluation team.

**3.1. LETTER OF SUBMITTAL (MANDATORY)**

The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A to this RFP) must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Consultant and any proposed subcontractors:

1. Name, address, principal place of business, telephone number, and fax number/e-mail address of legal entity or individual with whom contract would be written.
2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.)
3. Legal status of the Consultant (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
4. Federal Employer Tax Identification number and the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue. If the Consultant does not have a UBI number, the Consultant must state that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor.
5. Identify any state employees or former state employees employed or on the firm’s governing board as of the date of the proposal. Include their position and responsibilities within the Consultant’s organization. If following a review of this information, it is determined by the Department that a conflict of interest exists, the Consultant may be disqualified from further consideration for the award of a contract.

**3.2. TECHNICAL PROPOSAL (SCORED)**

The Technical Proposal must contain a comprehensive description of services including the following elements:

1. **Project Approach/Methodology** – Include a complete description of the Consultant’s proposed approach and methodology for the project. This section should convey Consultant’s understanding of the proposed project.
2. **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 Consultant’s knowledge of the subjects and skills necessary to successfully complete the project. Include required involvement of Department staff. The Consultant may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.
3. **Project Schedule** - Include a project schedule indicating when the elements of the work will  
   be completed. Project schedule must ensure that any deliverables requested are met.
4. **Outcomes and Performance Measurement –** Describe the impacts/outcomes the Consultants propose to achieve as a result of the delivery of these services including how these outcomes would be monitored, measured and reported to the Department.
5. **Risks -** The Consultant must identify potential risks that are considered significant to the success of the project. Include how the Consultant would propose to effectively monitor and manage these risks, including reporting of risks to the Department’s program manager.
6. **Deliverables** – Fully describe deliverables to be submitted under the proposed contract. Deliverables must support the requirements set forth in Section 1.3, Objectives and Scope of Work.

**3.3. MANAGEMENT PROPOSAL**

**A. Project Management (SCORED)**

1. **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. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.
2. **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. 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 Consultant must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the Department.

**B. Experience of the Consultant (SCORED)**

1. Indicate the experience the Consultant and any subcontractors have in the following areas associated with:

1. CRM consulting and implementation planning
2. Organizational Development
3. Working with a state or local government agency
4. Financial analysis, including federal and state funding requirements
5. Process and workflow analysis

2. Indicate other relevant experience that indicates the qualifications of the Consultant, and any subcontractors, for the performance of the potential contract.

**C. Related Information (MANDATORY)**

1. If the Consultant or any subcontractor contracted with the state of Washington during the past 24 months, indicate the name of the Department, the contract number and project description and/or other information available to identify the contract.
2. If the Consultant’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 Department previously or currently employed by, job title or position held and separation date.
3. If the Consultant 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 Consultant’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.
4. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Consultant’s position on the matter. The DEPARTMENT will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the Consultant in the past five years, so indicate.
5. **References (MANDATORY)**

Include 3 contracts the Consultant has had during the last five years that relate to the Consultant’s ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and e-mail addresses. By submitting a proposal in response to this RFP, the vendor and team members grant permission to the Department to contact these references and others, who from the Department’s perspective, may have pertinent information. The Department may or may not, at the Department’s discretion, contact references. The Department may evaluate references at the Department’s discretion.

1. **OMWBE Certification (OPTIONAL AND NOT SCORED)**

Include proof of certification issued by the Washington State Office of Minority and Womens Business Enterprises (OMWBE) if certified minority-owned firm and/or women-owned firm(s) will be participating on this project. For information: <http://www.omwbe.wa.gov>.

**3.4. COST PROPOSAL**

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

1. **Identification of Costs (SCORED)**

Identify all costs in U.S. dollars including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Consultant is to submit a fully detailed budget including staff costs and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Consultants are required to collect and pay Washington state sales and use taxes, as applicable.

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.

1. **Computation**

The score for the cost proposal will be computed by dividing the lowest cost bid received by the Consultant’s total cost. Then the resultant number will be multiplied by the maximum possible points for the cost section.

**4. EVALUATION AND CONTRACT AWARD**

**4.1. EVALUATION PROCEDURE**

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team(s), to be designated by the Department, which will determine the ranking of the proposals.

The Department, at its sole discretion, may elect to select the top-scoring firms as finalists for an oral presentation.

The RFP Coordinator may contact the Consultant for clarification of any portion of the Consultant’s proposal.

**4.2. EVALUATION WEIGHTING AND SCORING**

The following weighting and points will be assigned to the proposal for evaluation purposes:

**Technical Proposal – 35pts.**

|  |  |
| --- | --- |
|  | Points |
| Project Approach/Methodology | 10 |
| Quality of Work Plan | 10 |
| Project Schedule | 5 |
| Project Deliverables | 10 |

**Management Proposal – 35pts.**

|  |  |
| --- | --- |
|  | Points |
| Project Team Structure and  Internal Controls | 5 |
| Staff Qualifications/Experience | 15 |
| Experience of the Consultant | 15 |

**Cost Proposal – 15pts.**

**Interview – 15pts.**

**TOTAL - 100 POINTS**

The Department reserves the right to award the contract to the Consultant whose proposal is deemed to be in the best interest of the Department and the state of Washington.

**4.3. ORAL PRESENTATIONS/INTERVIEWS**

The Department, after evaluating the written proposals, will schedule oral presentations of the finalists. The Department will contact the top-scoring firm(s) from the written evaluation to schedule a date, time and location. Commitments made by the Consultant 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 apparent successful contractor.

**4.4. NOTIFICATION TO PROPOSERS**

The Department will notify the Apparently Successful Contractor of their selection in writing upon completion of the evaluation process. Individuals or firms whose proposals were not selected for further negotiation or award will be notified separately by e-mail.

**4.5. DEBRIEFING OF UNSUCCESSFUL PROPOSERS**

Any Consultant who has submitted a proposal and been notified that they were not selected for contract award may request a debriefing. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Unsuccessful Consultant Notification is e-mailed to the Consultant. Debriefing requests must be received by the RFP Coordinator no later than 5:00 PM, local time, in Olympia, Washington on the third business day following the transmittal of the Unsuccessful Consultant Notification. The debriefing must be held within three (3) business days of the request.

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

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

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

**4.6. PROTEST PROCEDURE**

Protests may be made only by Consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Consultant is allowed three (3) business days to file a protest of the acquisition with the RFP Coordinator. Protests must be received by the RFP Coordinator no later than 4:30 PM, local time, in Olympia, Washington on the third business day following the debriefing. Protests may be submitted by e-mail, but must include a scanned signature of the person authorized to submit the protest.

Consultants 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 Consultants 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 Department 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) the Department’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 Department. The Department 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 Consultant that also submitted a proposal, such Consultant 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 Department’s action; or
* Find only technical or harmless errors in the Department’s acquisition process and determine the Department to be in substantial compliance and reject the protest; or
* Find merit in the protest and provide the Department 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 Department determines that the protest is without merit, the Department will enter into a contract with the apparently successful contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

**5. Exhibit A**

Exhibit A Certifications and Assurances

**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:

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 the Department 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. If there are exceptions to these assurances, I/we have described them in full detail on a separate page attached to this document.
5. I/we understand that the Department will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of the Department, 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 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
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 the Department the right to contact references and other, who may have pertinent information regarding the ability of the Consultant and the lead staff person to perform the services contemplated by this RFP.
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.

**On behalf of the Consultant submitting this proposal, my name below attests to the accuracy of the above statement. We are submitting a scanned signature of this form with our proposal.**

Signature of Proposer

Title Date