

STATE OF WASHINGTON

OFFICE OF THE SECRETARY OF STATE

CORPORATIONS & CHARITIES DIVISION

RFP 24-08 NONPROFIT CORPORATIONS AND CHARITIES TRAINING PROGRAM

AMENDMENT NO. 2

(May 20, 2024)

SUMMARY

This Amendment No. 2 to RFP 24-08 amends Section 3. PROPOSAL CONTENTS, bringing the Technical Proposal Score, Management Proposal Score and Cost Proposal Score into line with those correctly specified in Section 4.4. EVALUATION WEIGHTING AND SCORING. Changes are highlighted in yellow.

3. PROPOSAL CONTENTS

Proposals must be complete, legible, signed, and follow all instructions stated in the solicitation (including the exhibits). Unless otherwise specified in writing by OSOS, documents included with an electronic proposal must be prepared in MS Word, MS Excel, or Adobe PDF. Where required to do so, Contractors may sign using either a physical or electronic signature.

Contractors' Proposals must respond to all of the solicitation requirements. Do not respond by referencing material presented elsewhere. The e-mailed Proposal shall be considered complete and stand on its own merits. Failure to respond to any portions may result in rejection of the Proposal as non-responsive.

This section identifies the submittals that must be provided as instructed below to constitute a responsive Proposal. Proposals that do not include all of the applicable submittals identified below are considered non-responsive and will be rejected. In addition, a Contractor's failure to complete any submittal as instructed may result in the Proposal being rejected. Contractors may not provide unsolicited materials. For any supplemental materials expressly required by OSOS in writing, Contractors must identify such supplemental materials with the Contractor's name.

Contractors must submit the following seven (7) electronic documents separately as email attachments:

- EXHIBIT A-1 – CONTRACTOR'S CERTIFICATION**
Complete the certification, attach any exceptions or required explanations, and submit it to the RFP Coordinator using the following file naming convention: **ContractorName_CERTIFICATION.pdf**. The certification must be complete. Where there are choices, bidders **must** check a box. The certification must be signed and submitted by a duly authorized representative of the Contractor.

(PARTIALLY SCORED – Pursuant to Executive Order 18-03, a 5% evaluation preference is given to those Contractors that certify that they do NOT require their employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers).

EXHIBIT A-2 – CONTRACTOR’S PROFILE & REFERENCES

Complete as instructed and submit to the RFP Coordinator using the following file naming convention: **ContractorName_REFERENCES.pdf**.

(PARTIALLY SCORED – A Contractor’s submitted references can earn up to a maximum of 10 points if they are a top-scoring Contractor).

TECHNICAL PROPOSAL

No form is provided for this submittal. The technical proposal must contain a comprehensive description of services including the following elements:

- A. Project Approach/Methodology – Include a complete description of the Contractor’s proposed approach and methodology for the project. This section should convey Contractor’s understanding of the proposed project.
- B. 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 Contractor’s knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of OSOS staff. The Contractor may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.
- C. Project Schedule – Include a project schedule indicating when the elements of the work will be completed and when deliverables will be provided. This project is expected to last from the date of contract execution through June 30, 2029.
- D. Deliverables – Fully describe deliverables to be submitted under the proposed contract.
- E. Outcomes and Performance Measurement – Describe the impacts/outcomes the Contractor proposes to achieve as a result of the delivery of these services, including how these outcomes would be monitored, measured and reported to OSOS.
- F. Risks – Define risks you identify as being significant to the success of the project. Include how you would propose to effectively monitor and manage these risks, including the reporting of risks to OSOS.

Submit to the RFP Coordinator using the following file naming convention:

ContractorName_TECHNICAL.pdf.

(SCORED – Up to a maximum of 70 points).

MANAGEMENT PROPOSAL

No form is provided for this submittal. The management proposal must include the following and demonstrate that the minimum qualifications set forth in Section 1.3 are met:

A. Project Management

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 individuals' particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. Contractor must commit that staff identified in its Proposal will actually perform the assigned work. Any staff substitution must have the prior approval of OSOS.

B. Experience of the Contractor

Indicate the experience the Contractor and any subcontractors that demonstrates the qualifications of Contractor and any subcontractors for the performance of the potential contract. Include a list of contracts the Contractor has had during the last five years that relate to the Contractor's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.

Submit to the RFP Coordinator using the following file naming convention:
ContractorName_MANAGEMENT.pdf.

(SCORED – Up to a maximum of 60 points).

COST PROPOSAL

The fee for this contract cannot exceed \$2,500,000 for the contract period specified herein – July 1, 2024 to June 30, 2029. Any Proposal containing a fee exceeding this amount will be rejected as non-responsive to this RFP.

No form is provided for this submittal. Identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Contractor 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. Contractors are required to collect and pay Washington state sales tax, if applicable. Costs for subcontractors are to be broken out separately.

Submit to the RFP Coordinator using the following file naming convention:
ContractorName_COST.pdf.

(SCORED – Up to a maximum of 70 points).

CONTRACT ISSUES LIST [IF APPLICABLE]

No form is provided for this submittal. This is a required submittal ONLY IF Contractor has business issues with the contract attached as Exhibit B. If so, Contractor must prepare a Contract Issues List, attach it to Exhibit A-1 and submit it to the RFP Coordinator using the following file naming convention: ContractorName_ISSUES.pdf. Note, however, that OSOS reserves the right not to modify the contract and to award the contract on the basis of a Contractor's willingness to agree to the contract attached as Exhibit B.

(NOT SCORED)

- CONTRACTOR'S DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS [IF APPLICABLE].
No form is provided for this submittal. This is a required submittal ONLY IF Contractor will be using subcontractors to perform the contract. If so, Contractor must outline its inclusion plan for diverse business subcontractors pertaining to the contract and submit it to the RFP Coordinator using the following file naming convention:
ContractorName_INCLUSIONPLAN.pdf.

(NOT SCORED)