STATE OF WASHINGTON

OFFICE OF THE SECRETARY OF STATE

CORPORATIONS & CHARITIES DIVISION

RFP 24-08 NONPROFIT CORPORATIONS AND CHARITIES TRAINING PROGRAM

AMENDMENT NO. 1

(May 16, 2024)

SUMMARY

This Amendment No. 1 to RFP 24-08: (1) contains the agenda prepared for the Preproposal Conference held on May 14, 2024; and (2) compiles the questions received from vendors prior to and during the Preproposal Conference and provides OSOS official answers to each of the vendors' questions.

PREPROPOSAL CONFERENCE AGENDA

RFP 24-08

Nonprofit Corporations and Charities Training Program

Office of the Secretary of State, Corporations & Charities Division

PREPROPOSAL CONFERENCE

Tuesday, May 14, 2024

11:00 a.m.

(via Microsoft Teams)

AGENDA

I. Welcome & Introductions

Ivan Zavrazhnov, RFP Coordinator, Operations Division, Office of the Secretary of State
Scott Douglas, Director of Corporations & Charities Division, Office of the Secretary of State
Constance Parbon, Charities and Public Affairs Administrator, Office of the Secretary of State
Jim Webster, Contracts Supervisor, Operations Division, Office of the Secretary of State

II. Important Information for Bidders on Solicitation Process *(Ivan Zavrazhnov/Jim Webster, 5 minutes)*

A. RFP Coordinator is Sole Contact for Questions/Communications

B. Resources for Official Answers, RFP Amendments, and Notifications

- Washington Electronic Business Solution (WEBS)
- OSOS Current Procurements Webpage

C. Questions & Answers

- Ask questions but follow up with an email to RFP Coordinator
- Answers at conference are unofficial; official answers will be posted on May 16, 2024
- All questions and official answers will be posted on May 22, 2024

D. Important Dates

May 20, 2024 – Last Day for Questions

May 22, 2024 – All Questions & Answers will be posted

June 14, 2024 – Proposal Due Date

June 24, 2024 – Apparent Successful Bidder Announced

July 1, 2024 – Contract Start Date

III. Background and Objectives of RFP *(Scott Douglas, Constance Parbon, 5-10 minutes)*

IV. Question and Answer Session

V. Final Comments

PREPROPOSAL CONFERENCE QUESTIONS & ANSWERS

Q1: Is the training program technical (business, finance, job-specific tasks), or broader, such as leadership, change management, behavioral performance management, etc.?

> **A1:** The training program should include technical/legal compliance such as required registration and reporting to state and federal government. We are also looking for training on best practices for operating and sustaining thriving charities and nonprofits. That can include leadership development, volunteer recruitment and retention, financial sustainability, and other "best practice" topics, at the discretion of the bidder.

Q2: We are reaching out about the recent RFP and requesting more information on the content expertise needed.

> **A2:** Among the criteria for evaluating proposals will be demonstrated expertise in successfully delivering trainings and engagement with the target audience – charities and nonprofits in Washington, including engagement with diverse constituencies.

Q3: What exactly are you looking for? Consulting, facilitation, or creating curriculum?

> **A3:** We have a robust curriculum available to us that has been developed and refined over the course of prior contracts for education and engagement. While we are open to bidder using their own curriculum, either solely or in coordination with existing curriculum, we are looking for bidders who can providing trainings soon after initiation of the contract, rather than developing new curricula before delivering trainings.

Q4: Who is the target audience? Managers, all of the people working in charities, or a "train the trainer"?

> **A4:** The target audience is nonprofits and charitable organizations across Washington state. This should at a minimum include nonprofit board members, executive staff, and can include volunteers or other members of nonprofits who would benefit from training and engagement.

Q5: I would love to learn a little bit more about your technical requests. There was some commentary around maintaining a website, so just curious around would this proposal be a part of advising on that website and then maintaining it?

> **A5:** The current contractor maintains a website where materials and some training videos are available. The existing website is owned and maintained by the current contractor, so bidders would not be expected to maintain that website. We encourage information in the proposals regarding online presence, as we have learned through participant feedback that people like having reference materials available, as well as remote learning platforms for those organizations located in geographically isolated areas.

Q6: Should we consider looking at a learning management system so you can actually track who has taken the training and sort of you know gone through the entire process to be certified?

> **A6:** It is helpful for our own reporting metrics to be able to track participation as well as repeat participation. der. That would fit in as part of the tracking of success and demonstrating outreach and efficacy of engagement. What those metrics are and how they are tracked would be up to the bidder.

Q7: What problems are you trying to solve here? Is that is that compliance health and safety, customer service leadership effectiveness?

> **A7:** One aspect is compliance with state regulations. For example, most nonprofits are also charities, and many of the nonprofits registered with us have not completed the separate registration required under the Charitable Solicitations Act. But the main aspect and goal is showing how to effectively operate a nonprofit and charitable organization, and to do so within the parameters of state and federal law.

Q8: Given the total amount of the budget, and I'm assuming that amount is for the full contract period of five years, can we or how should we be thinking about budgeting or allocating across the contract period? Specifically, can we do different amounts for each year?

A8: That cost proposal should include a breakdown of annual anticipated expenses, but it is at the discretion of the bidder how to allocate the funds available across the five-year term of the contract.

Q9: Is there going to be another RFP coming out for smaller contractors or is this for everybody who's interested in applying under this one RFP?

A9: One state-wide contract will be awarded under this RFP. We just recently concluded a request for proposals and contract negotiation for a smaller contract specifically for education and engagement with Indigenous nonprofits and charities across Washington. Thus far, that is the first smaller contract that we've issued. We are exploring in conjunction with the Charitable Advisory Council that's under the Secretary's auspices to consider whether there would be additional smaller contracts targeted either geographically or demographically, and what that would look like. But at this point we don't have anything queued up. We were successful in increasing the amount that we have available to spend from the statutorily created fund through legislative appropriation. Although the funds are sitting in the account, the amount that we can spend per biennium from that fund has to be approved by the legislature. We were successful in getting an increase in the overall amount available for us to spend through the legislature this past session and that will kick in on July 1st. That gives us the authority to then move forward with what we intend to be one or more additional smaller grants.

Q10: Can you talk a little bit about your stance on innovation? Are you looking for a fairly traditional model, or are you interested in looking at innovative ways to meet the scope of work that you're looking for?

A10: We are open to both approaches. There are some sort of basic basics like the compliance things that are that are going to need to be there regardless, but we are also very much aware that this whole process is coming off the heels of the pandemic and the huge changes that we have seen in the nonprofit sector. We are definitely open to innovative ways to address some of those changes and some of the emerging needs as long as it is also meeting those basic of basic compliance requirements as well.

Q11: You mentioned earlier that you have a robust program now and so you're not looking for a lot of content development, but more outreach and distribution of content. Is there a place where that content is being hosted now?

A11: Currently you can find the education materials on the incumbent contractor Nonprofit Association of Washington's website https://nonprofitwa.org.

Q12: I was wondering if we had any metrics on how many trainings per year would be expected or per quarter or if there was any guidance on the number of trainings to be expected over the course of each year within the contract.

A12: We don’t require a specific number of trainings per quarter or year. That’s going to be based on the proposal from the bidder of what that looks like as far as in person and possibly hybrid or webinar-based trainings.

Q13: We are a part of a training institute, so we do have quite a few trainings already formulated in house and I understand that the contract asked for us to teach curriculum that's already been written and approved, but we were wondering if you were at all interested in expanding your offerings of trainings?

A13: We are definitely open to that.

Q14: Are you seeking multiple contractors, or will you be selecting a single provider who submits a response to the RFP?

A14: We are looking for one primary contractor but in the past for our contracts, the successful bidders have teamed with subcontractors to help broaden that statewide outreach.

Q15: Exhibit C has an item related to engaging and supporting rural and geographically isolated communities in addition to other outreach. What is the balance of the program related to that outreach and engagement versus the training program development and delivery? Is the bidder winning this contract responsible for all that outreach and engagement like identifying participants and signing them up or is that a kind of a shared responsibility between your organization and the bidder?

A15: Our office is able to provide lists of nonprofits that are registered with our office as well as charitable organizations and other resources, but ultimately it is the responsibility of the bidder to create those lists.

Q16: If the facilitators are contractors or subcontractors out of state, do they have to live in Washington or can they travel and with the trouble be compensated?

A16: The contractors or the subcontractors don't have to be within Washington, but they do need to be registered to do business in Washington, and the primary contractor needs to be registered to contract with the State of Washington through the Department of Enterprise Services. If there are travel expenses involved, that would be something that we would want to see in the cost proposal, but there is no bar to paying those legitimate travel expenses related to deliverables under the contract.

Q17: Do you anticipate a certain number of employees or participants in training over the five years or is it acceptable to put just a single per-person pricing and you know that would be the assumed price going forward per person?

A17: The funding is not awarded per attendee. While it is helpful to get a sense of performance and engagement, the funding is not dependent on a minimum number of organizations or individuals being reached.

Q18: Do we have a ballpark number of attendees you anticipate?

A18: There's no specific quota or specific expectation for minimum attendance numbers.
Some of the successful contractors in the past have included the number of the number of activities available, whether they're in person or online or hybrid, and some track record of what attendance has looked like for past presentations, and the geographic scope.

Q19: Is a specific tool that we use for gathering feedback from participants, or is that once again something that we should come to the table with?

> **A19:** There are a lot of different ways that the feedback can be collected and collated, and so if you have existing successful methods, we're definitely open to hearing that, but there are no there's no specifically required format tool in this in this instance.

Q20: Regarding best practices learned, I was wondering if you could share a little bit more of what those look like and maybe some pain points that would bring this all to life for all of us and how to address?

> **A20:** When it comes to best practices, it's really listening to the organizations that you're educating and garnering that feedback from them to know what's working and what's not. And then having that game plan to implement. In regard to best practices for nonprofits and the education that we're seeking for them to receive, it's really the best practices on board governance, how to be operating that nonprofit, maintaining volunteerism and just being an impactful nonprofit to the community served.