

STATE OF WASHINGTON
OFFICE OF THE SECRETARY OF STATE
OLYMPIA, WASHINGTON
REQUEST FOR PROPOSALS
RFP NO. 25-03

PROJECT TITLE: OSOS Migration to WaTech Tenant

PROPOSAL DUE DATE: April 18, 2025

EXPECTED TIME PERIOD FOR CONTRACT: July 1, 2025 to June 30, 2027

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

CONTENTS OF THIS REQUEST FOR PROPOSALS

1. Introduction
2. General Information for Bidders
3. Proposal Contents
4. Evaluation and Contract Award
5. Exhibits
 - A-1. Bidder's Certifications
 - A-2. Bidder's Profile & References
 - B. Contract

TABLE OF CONTENTS

1.Introduction.....4

 1.1 Purpose and Background.....4

 1.2 Objectives.....5

 1.3 Minimum Qualifications.....10

 1.4 Period of Performance.....10

 1.5 Definitions.....11

 1.6 ADA.....11

2. General Information for Bidders.....11

 2.1 RFP Coordinator.....11

 2.2 Estimated Schedule of Procurement Activities.....12

 2.3 Preproposal Conference.....12

 2.4 Submission of Proposals.....13

 2.5 Proprietary Information/Public Disclosure.....13

 2.6 Revisions to the RFP.....14

 2.7 Small & Diverse Businesses.....14

 2.8 Acceptance Period.....15

 2.9 Responsiveness.....15

 2.10 Most Favorable Terms.....15

 2.11 Contract.....16

 2.12 Costs to Propose.....16

 2.13 No Obligation to Contract.....16

 2.14 Rejection of Proposals.....16

 2.15 Commitment of Funds.....16

2.16 Electronic Payment.....	16
2.17 Insurance Coverage.....	16
2.18 Evaluation Preference.....	17
3. Proposal Contents.....	17
4. Evaluation and Contract Award.....	21
4.1 Evaluation Procedure.....	21
4.2 Responsibility.....	21
4.3 Responsiveness.....	21
4.4 Evaluation Weighting and Scoring.....	22
4.5 Oral Presentations.....	23
4.6 Best and Final Offer.....	23
4.7 Request for Documents.....	24
4.8 Contract Execution.....	24
4.9 Notification to Bidders.....	24
4.10 Complaint, Debriefing and Protest Procedures.....	25
5. RFP Exhibits.....	28
Exhibit A-1 – Bidder’s Certifications	
Exhibit A-2 – Bidder’s Profile & References	
Exhibit B – Contract	

1. INTRODUCTION

1.1 PURPOSE AND BACKGROUND

The State of Washington, Office of the Secretary of State (OSOS) is seeking a qualified consulting firm for the purposes of migrating the OSOS Active Directory Domain Services (ADDS) domain and forest, Entra ID/365 Services, and Azure environments to Washington Technology Solutions' (WaTech) Enterprise Active Directory (EAD) and Entra ID/Azure Washington State Executive (WSE) tenants. We are looking for a partner who is an expert in planning and conducting Active Directory, Entra/M365, and Azure migrations. Extensive experience with migrating ADDS Forests, Domains, Entra ID, M365 suite and custom built and maintained applications within state government and specifically into the WaTech shared tenant is preferred.

To establish a detailed timeline of the preparation and migration process, the firm that is awarded a contract as a result of this solicitation (the Contractor) must first conduct, in active engagement with WaTech and OSOS stakeholders, a requirements analysis with respect to migrating the OSOS' Active Directory, Entra ID, and Azure environments. From that analysis, the Contractor shall develop a work breakdown structure that will define the phases, timelines, dependencies, and roles and responsibilities. These tasks are described in greater detail below.

Contractor must also provide organizational change management services for OSOS' staff and IT teams. OSOS has maintained its own domains, Entra, and Azure environments for in excess of twenty years. Since WaTech's ADDS (EAD), EID, and Azure platforms have different standards, policy enforcement, and functionality than the current OSOS-maintained domains and environments, migrating to hosted environments will bring a significant shift in daily operations. Contractor must provide OSOS with a clear understanding of the changes in daily operations that this migration will bring to ensure continuity of operations and the ability to provide exceptional support.

OSOS maintains four critical systems that will be impacted by the migration to WaTech's shared tenant: (1) the Corporations & Charities Filing System, which also includes the eApostilles and Domestic Partnership systems (collectively, CCFS); (2) the Digital Archives; (3) the payment/revenue management system; and (4) the Combined Fund Drive donor management system (CFD). Internal systems such as Service Now, file servers and other internal support systems and applications will also be impacted.

CCFS is completely hosted in Azure running solely on PaaS architecture. The Digital Archives is completely hosted in Azure with a primarily PaaS architecture, on minimal IaaS resources.

The CFD migration is currently underway and will require substantial analysis to determine its migration path.

In 2024, OSOS collaborated with a third-party vendor to conduct a study to evaluate the feasibility of completing this migration in full. The study produced significant documentation that will be made available to the Contractor. While this documentation includes a gap analysis and a requirements analysis, it does not provide the level of detail needed to develop a comprehensive and particularized work breakdown structure or complete the migration, but it does provide valuable analysis to assist in the migration planning and implementation.

The work to be performed under this engagement is in furtherance of and supports OSOS' compliance with RCW 43.105.375 and WaTech's Data Center Investments Policy EA-02-03-S, (formerly Policy 184).

1.2 OBJECTIVES

- **Conduct a Requirements Analysis.** The Contractor shall perform a Requirements Analysis (RA) on the migration of OSOS' Active Directory, Entra ID, and Azure environment to WaTech's Enterprise Active Directory, shared tenant, and Azure environment. The difference between this RA and the requirements analysis provided as part of the 2024 feasibility study is that, in this RA, Contractor shall determine the requirements and expectations to complete the migration in active engagement with OSOS and WaTech stakeholders. Contractor's deliverable in this regard shall be a list of clearly defined and documented requirements with actionable items that will be used to create the work breakdown structure. The RA shall:
 - Verify the tools that OSOS currently uses are compatible with the shared tenant model. These tools include "on prem" solutions within Active Directory as well as Entra registered Enterprise Apps. Examples of these tools include, but are not limited to:
 - Veeam 365 (known incompatible)
 - Rapid7 IDR
 - CloudFlare Email Security
 - DataDog monitoring solution
 - NextRequest
 - Adobe

- Catalogue and identify native functionality within Entra and Azure that is incompatible with the shared tenant model. An example of this type of functionality is Access Packages.
 - Verify and document the migration path for Azure DevOps.
- **Develop a Work Breakdown Structure.** The Contractor shall create a clearly defined and documented Work Breakdown Structure (WBS) that addresses with particularity each component of the migration. The WBS shall define the major milestones of migration, e.g., Active Directory, M365 services (SharePoint, OneDrive, user accounts), and domain names. Additionally, the WBS shall identify the responsible parties from Contractor, OSOS, WaTech and any other participating entity or organization for each of the milestones and/or sub-tasks. The WBS shall include the projected timeline to complete each task, any projected service impacts to staff that could result in loss of functionality, and any planned outages that would impact OSOS' ability to provide public or internal services. There must be clear traceability and alignment between the RA and the WBS to ensure that the project needs are met.
- **Work within Steering Committee Approval Structure.** The Contractor will present all work and decisions to an OSOS steering committee in advance for acceptance and approval, including without limitation the project schedule, timelines, and any action taken as part of the migration.
- **Perform and Document Migration Work.** The Contractor shall perform the migration in accordance with the RA and resulting WBS as accepted and approved by the OSOS steering committee, and shall produce written documentation before, during, and after the migration has been completed. The documentation shall be created to provide detailed analysis for technical recommendations, as well as provide technical detail for any changes that are to be made to the OSOS or WaTech environments. This documentation shall provide a written record of the “why” and “what” that can be relied upon and referenced by the OSOS steering committee, OSOS executive management and technical staff throughout and after the completion of the migration process.
- **Provide Organizational Change Management Services.** Before, throughout and after the migration process, Contractor shall provide contemporaneous and forward-looking communications, notices, guidance, documentation, and training to appropriate OSOS stakeholders regarding changes to daily operating tasks that will

be occasioned by the tenant migration. **Changes that impact OSOS staff's daily duties shall be communicated to appropriate OSOS stakeholders no less than two weeks prior to implementing the change, and in all cases shall be documented and resourced for training and other purposes relevant to change management, continuity of operations, and customer support.** Such examples include, but are not limited to:

- **Staff Impacts**

Identify, document and resource changes to OSOS staff's daily duties– this primarily focuses on SharePoint, Exchange/Outlook/M365 permission or functionality impacts. WaTech has more functionality enabled in the shared tenant than OSOS, such as Sensitivity Labels. Training in new functionality such as Sensitivity labels, as well as engaging with OSOS IT and business owners to intentionally manage the Purview suite and its impact on OSOS operations is required.

- **Service Desk Impacts**

Identify, document and resource Changes to the Service Desk's daily duties with the restricted access provided to members of the shared tenant and the design of workflows for support. There is minimal documentation regarding the delegation of duties. Contractor shall engage with WaTech to provide defined roles and responsibilities for Service Desk operations.

- **System Administrator Impacts**

Identify, document and resource Changes to the System Administrator's daily duties with the restricted access provided to members of the shared tenant and identifying support workflows. There is minimal documentation regarding the delegation of duties. Contractor shall engage with WaTech to provide defined roles and responsibilities for Systems Administration operations.

- **Application Developer Impacts**

Identify, document and resource Changes to the Application Developer's daily duties with the restricted access provided to members of the shared tenant and identifying the support workflows. There is minimal documentation regarding the delegation of duties. Contractor shall engage with WaTech to provide defined roles and responsibilities for Application Development

operations. This uncertainty primarily focuses on the migration of the Azure DevOps organization and the impact, if any, the shared tenant will have on daily operations.

- **Information Security Impacts**

Identify, document and resource changes to Information Security's daily duties with the restricted access provided to members of the shared tenant and identifying the support workflows. There is minimal documentation regarding the delegation of duties. Contractor shall engage with WaTech to provide defined roles and responsibilities for Information Security operations, specifically around levels of permission in Entra, Azure, and Defender for Cloud portals.

- **Public Records Impacts**

Identify, document and resource changes to OSOS Public Records staff's daily duties with the restricted access provided to members of the shared tenant and identifying the support workflows. There is minimal documentation regarding the delegation of duties. Contractor shall engage with WaTech to provide defined roles and responsibilities for Public Records operations. This primarily focuses on Microsoft Purview and eDiscovery.

- **Migrate Azure Subscriptions.** Contractor shall migrate all Azure subscriptions and resources from the OSOS Directory to the WaTech shared tenant directory in the most effective and efficient manner possible. Subscriptions include PaaS applications that support the residents of Washington State, IaaS resources that support the Azure environment and OSOS internal operations, and significant network infrastructure that enable and secure the Azure environment.

- **Comply with Requirements for Migration Tool Usage and Removal.**

- **Migration Tool Identification and Approval.** Prior to initiating any migration activities, Contractor shall provide OSOS with a comprehensive list of all tools, software, and utilities intended for use during the migration process (collectively, the Migration Tools). This list shall include the tool name, software version, and a description of its intended use. All Migration Tools must receive written approval from the OSOS Chief Information Security Officer (CISO) before deployment. Any proposed changes or additions to the

Migration Tools after initial approval must also receive written authorization from the OSOS CISO prior to implementation.

- **Migration Tool Removal and Evidence of Compliance.** Upon successful completion of the migration, Contractor shall ensure the thorough removal of all Migration Tools from OSOS systems, leaving a minimal footprint and ensuring no residual software, scripts, logs, or configurations remain.

Contractor shall provide a comprehensive report documenting the removal process, including but not limited to:

- A list of all removed Migration Tools with their corresponding software versions.
- Confirmation that no residual artifacts remain on OSOS systems.
- Logs or other evidence acceptable to OSOS demonstrating successful tool removal.

Contractor shall submit this report to the OSOS CISO for review and approval within ten (10) business days of migration completion. Final acceptance of the migration shall be contingent upon the OSOS CISO's written confirmation that all Migration Tools have been successfully removed in accordance with the foregoing requirements.

Successful completion of this engagement shall result in: (1) The complete migration of the OSOS AD domain being adopted in the WaTech Enterprise Active Directory Forest along with all servers, workstations, other hardware, and group policies with minimal disruption and zero data loss; (2) The complete migration of the OSOS Entra/M365 environment to the WaTech Shared Tenant, including without limitation all existing OSOS functionality such as OneDrive, SharePoint, Intune, Conditional Access Policies, PIM roles and configuration, among others; (3) The complete migration of all OSOS Azure subscriptions, including without limitation all applications, operations, and virtual desktop subscriptions; and (4) before, throughout and after the migration, the maintenance of a well-informed and appropriately trained and supported OSOS staff, sufficient to ensure continuity of operations and the ongoing provision of exceptional customer support.

1.3 MINIMUM QUALIFICATIONS

By the time of contract execution, the Apparent Successful Bidder must be registered to do business with the state and have a current Unified Business Identifier (UBI).

The Bidder team proposed to perform the migration must possess at minimum three (3) technical subject matter experts with a minimum of five (5) years' experience each in executing complex cloud migration projects. The Bidder team cannot count collective years' experience to meet a minimum year requirement.

The Bidder team must also have a minimum of three (3) years proven proficiency in all of the following areas:

Cloud Technologies:

- Microsoft Azure Solutions Architecture
- Microsoft Azure Identity and Access Administration
- Microsoft Azure General Administration
- Microsoft Office 365 Administration

Enterprise Technologies:

- Microsoft Windows SQL Server
- Microsoft Windows Server
- Microsoft Server roles and features with emphasis on:
 - Active Directory Domain Services
 - File and Storage Services
 - Hyper-V

The technical subject matter experts on the Bidder team must have the following active certifications among them: **AZ-305: Azure Solutions Architect Expert** certification, **SC-100: Cybersecurity Architect Expert** certification, and **Information Assurance Technical (IAT) Level III** certification. This requirement is met whether a single team member holds all of the certifications listed above, or each certification is held by a different team member, or one member holds one and another holds two of the certifications.

1.4 PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about July 1, 2025, and to end on June 30, 2027. Amendments extending the period of performance, if any, shall be at the sole discretion of OSOS.

1.5 DEFINITIONS

The following terms as used in this RFP shall have the meanings ascribed to them below:

Apparent Successful Bidder – the Bidder identified by OSOS, after evaluation of Proposals, who is recommended for contract award.

Bidder – an individual, firm or company submitting a Proposal in order to attain a contract with OSOS.

Contractor – the individual, firm or company awarded a contract as a result of this RFP.

OSOS – The Office of the Secretary of State, the agency of the state of Washington that is issuing this RFP.

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

RFP – This Request for Proposals.

WEBS – Washington’s Electronic Business Solution, an online vendor registration and bid notification system.

1.6 AMERICANS WITH DISABILITIES ACT COMPLIANCE

OSOS complies with the Americans with Disabilities Act. Bidders may contact the RFP Coordinator to receive this RFP in Braille or on tape.

2. GENERAL INFORMATION FOR BIDDERS

2.1 RFP COORDINATOR

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

Name of RFP Coordinator:	Jim Webster
Address:	6880 Capitol Blvd SE
City, State, Zip Code:	Tumwater, WA 98501
E-Mail Address:	jim.webster@sos.wa.gov

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

2.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue RFP	March 3, 2025
Question and Answer Period	March 3-28, 2025
Last Date for Questions regarding RFP	March 28, 2025
Preproposal Conference	March 18, 2025
Publish Q&As from Preproposal Conference	March 24, 2025
Publish complete list of Q&As	April 1, 2025
Last Amendment to RFP	April 9, 2025
Last Date for Complaint	April 11, 2025
Proposals Due	April 18, 2025
Evaluate Proposals	April 19 - May 2, 2025
Conduct Oral Presentations with Finalists <i>(if applicable)</i>	May 5 – 9, 2025
Announce Apparent Successful Bidder and Notify Unsuccessful Bidders	May 12, 2025
Hold Debriefing Conferences (if requested)	See Section 4.10
Protest	See Section 4.10
Negotiate Contract	May 12 – 30, 2025
Begin Contract Work	July 1, 2025

OSOS reserves the right to revise the above schedule.

2.3 PREPROPOSAL CONFERENCE

A preproposal conference is scheduled to be held on Tuesday, March 18, 2025 from 9 – 10 a.m. Pacific Time, via Microsoft Teams (information to join meeting is below). All prospective Bidders should attend; however, attendance is not mandatory. OSOS shall be bound only to

written answers to questions. Any oral responses given at the preproposal conference shall be considered unofficial.

Within five (5) business days of the preproposal conference, a copy of the questions from the preproposal conference and the official OSOS answers will be posted on WEBS and on the OSOS website at: <http://www.sos.wa.gov/office/procurements.aspx>.

2.4 SUBMISSION OF PROPOSALS

Bidders are required to submit an electronic copy of their Proposal. The Proposal must be received by OSOS no later than 5:00 p.m., Pacific Time, on Friday, April 18, 2025. Attachments to the e-mail shall be in Microsoft Word, Microsoft Excel or Adobe PDF format.

The Proposal is to be sent to the RFP Coordinator at the e-mail address noted in Section 2.1.

Late Proposals will not be accepted and will be automatically disqualified from further consideration. All Proposals and any accompanying documentation become the property of OSOS.

The Proposal 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.

Include Bidder's contact information for this RFP with name, title, email, and telephone number.

The Apparent Successful Bidder will be expected to enter into a contract which is substantially the same as the Contract attached as Exhibit B. In no event is a Bidder to submit its own standard contract terms and conditions in response to this solicitation. Bidders may submit exceptions as allowed in Exhibit A-1 – Bidder's Certification. All exceptions to the contract terms and conditions must be submitted as an attachment to Exhibit A-1 – Bidder's Certification. OSOS will review requested exceptions and accept or reject the same at its sole discretion.

2.5 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Materials submitted in response to this competitive procurement shall become the property of OSOS.

All Proposals received shall remain confidential until the Apparent Successful Bidder has been announced; thereafter, the Proposals shall be deemed public records as defined under the Public Records Act, RCW Chapter 42.56.

Any information in the Proposal that a Bidder desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.56.270 must be clearly designated. The page must be identified and the particular exception from disclosure upon which the Bidder is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right-hand corner of the page.

OSOS will consider a Bidder's request for exemption from disclosure; however, OSOS will decide predicated upon RCW Chapter 42.56 and Chapter 143-06 of the Washington Administrative Code. Marking the entire Proposal exempt from disclosure will not be honored. Bidders must be reasonable in designating information as confidential. If any information is marked as proprietary in the Proposal, such information will not be made available until the affected Bidder has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.56.120. 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.

2.6 REVISIONS TO THE RFP

If it becomes necessary to revise any part of this RFP, amendments will be published on WEBS and the OSOS website at: <http://www.sos.wa.gov/office/procurements.aspx>. For this purpose, any pertinent information, and answers to substantive questions by potential Bidders shall be considered an amendment to the RFP and published on WEBS and the OSOS website. OSOS reserves the right to cancel or reissue this RFP, in whole or in part, prior to execution of a contract.

2.7 SMALL & DIVERSE BUSINESSES

OSOS, in accordance with Washington law, encourages small and diverse businesses to compete for and participate in state procurements as Bidders and as subcontractors to awarded Bidders. See, e.g., RCW 39.19 (OMWBE certified businesses); RCW 43.60A.200 (WDVA certified veteran-owned businesses); and RCW 39.26.005 (Washington small businesses).

OMWBE Certification. Bidders may contact the Washington State Office of Minority and Women's Business Enterprises (OMWBE) regarding information on Minority-Owned and

Women-Owned certified firms, state and federal certification programs, or to become certified. OMWBE can be reached by telephone, 866-208-1064, or through their website at [Office of Minority and Women's Business Enterprises](#). OMWBE-Certified firms may provide their certification information on Exhibit A-2 – Bidder's Profile & References.

WDVA Certification. Bidders may contact the Washington State Department of Veterans' Affairs (WDVA) for information regarding Certified Veteran-Owned businesses or to become a Certified Veteran-Owned Business. The WDVA can be reached by telephone, (360) 725-2169, or through their website at [Home | WDVA](#). The qualification requirements to be a Certified Veteran-Owned Business are set forth in Exhibit A-1 – Bidder's Certification.

Washington Small Businesses. Bidders may contact OSOS about small and diverse business inclusion and qualification as a Washington Small Business. If you qualify as a Washington Small Business, identify yourself as such in WEBS. Call WEBS Customer Service at 360-902-7400. The qualification requirements to self-certify as a Washington Small Business are set forth in Exhibit A-1 – Bidder's Certification.

2.8 ACCEPTANCE PERIOD

Proposals must provide 90 days for acceptance by OSOS from the later of the due date for receipt of Proposals or receipt of best and final offers (if utilized). The Apparent Successful Bidder agrees that during the acceptance period it may not modify, withdraw, or cancel its Proposal.

2.9 RESPONSIVENESS

All Proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. Bidders are specifically notified that failure to comply with any part of the RFP may result in rejection of their Proposal as non-responsive. OSOS reserves the right, however, to waive minor administrative irregularities at its sole discretion.

2.10 MOST FAVORABLE TERMS

OSOS 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. OSOS reserves the right to contact a Bidder for clarification of its Proposal. OSOS also reserves the right to enact a best and final offer (BAFO) process. If so enacted, the procedure is described in Section 4.

Bidders should be prepared to accept this RFP, all amendments to this RFP, all clarifying responses, and a best and final offer, as applicable, for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Apparent

Successful Bidder's Proposal. It is understood that the Proposal will become a part of the official procurement file on this matter without obligation to OSOS.

2.11 CONTRACT

The form of the contract that may be awarded as a result of this solicitation is attached as Exhibit B, Contract. The Apparent Successful Bidder will be expected to enter into a contract which is substantially the same as the Contract attached as Exhibit B. In no event is a Bidder to submit its own standard contract terms and conditions in response to this solicitation. Bidders may submit exceptions as allowed in Exhibit A-1 – Bidder's Certification. All exceptions to the contract terms and conditions must be submitted as an attachment to Exhibit A-1 – Bidder's Certification. OSOS will review requested exceptions and accept or reject the same at its sole discretion.

2.12 COSTS TO PROPOSE

OSOS will not be liable for any costs incurred by a Bidder in preparation of a Proposal submitted in response to this RFP, in conduct of a presentation, or in any other activities related to responding to this RFP.

2.13 NO OBLIGATION TO CONTRACT

This RFP does not obligate the state of Washington or OSOS to contract with any Bidder for the goods and/or services specified herein.

2.14 REJECTION OF PROPOSALS

OSOS 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.

2.15 COMMITMENT OF FUNDS

The Secretary of State or their delegate are the only individuals who may legally commit OSOS to the expenditure 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.

2.16 ELECTRONIC PAYMENT

The state of Washington prefers to utilize electronic payment in its transactions. The Apparent Successful Bidder will be provided a form to complete with the contract to authorize such payment method.

2.17 INSURANCE COVERAGE

Should a contract be awarded pursuant to this RFP, the Bidder will be required to provide insurance coverage as described in Exhibit B, Contract.

Bidder 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 responsible in any way for claims filed by the Bidder or its employees for services performed under the terms of the contract.

2.18 EVALUATION PREFERENCE

Pursuant to RCW 39.26.160(3) (best value criteria) and consistent with Executive Order 18-03 – Supporting Workers' Rights to Effectively Address Workplace Violations (dated June 12, 2018), OSOS will evaluate bids for best value and will provide a bid preference in the amount of 5% to any Bidder who certifies, pursuant to Exhibit A-1 – Bidder's Certification, 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 waivers.

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, Bidders may sign using either a physical or electronic signature.

Bidders' 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 Bidder's failure to complete any submittal as instructed may result in the Proposal being rejected. Bidders may not provide unsolicited materials. For any supplemental materials expressly required by OSOS in writing, Bidders must identify such supplemental materials with the Bidder's name.

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

EXHIBIT A-1 – BIDDER’S CERTIFICATION

Complete the certification, attach any exceptions or required explanations, and submit it to the RFP Coordinator using the following file naming convention: BidderName_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 Bidder.

(PARTIALLY SCORED – Pursuant to Executive Order 18-03, a 5% evaluation preference is given to those Bidders 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 – BIDDER’S PROFILE & REFERENCES

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

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

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 Bidder’s proposed approach and methodology for the project. This section should convey Bidder’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 Bidder’s knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of OSOS staff. Bidders 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.

D. Deliverables – Fully describe deliverables to be submitted under the proposed contract.

E. Outcomes and Performance Measurement – Describe the impacts/outcomes the Bidder 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 managing these risks, including the reporting of risks to OSOS.

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

(SCORED – Up to a maximum of 100 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 the 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. Bidders 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 Bidder

Indicate the experience the Bidder and any subcontractors that demonstrates the qualifications of Bidder and any subcontractors for the performance of the potential

contract. Include a list of contracts the Bidder has had during the last five (5) years that relate to the Bidder's ability to perform the services needed under this RFP. List a minimum of two (2) 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: BidderName_MANAGEMENT.pdf.

(SCORED – Up to a maximum of 80 points).

COST PROPOSAL

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 Bidder 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. The Bidder shall also include a proposed payment schedule that provides for partial payments upon completion of major milestones in the engagement. Bidder will be 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: BidderName_COST.pdf.

(SCORED – Up to a maximum of 10 points).

CONTRACT ISSUES LIST [IF APPLICABLE]

No form is provided for this submittal. This is a required submittal ONLY IF Bidder has business issues with the contract attached as Exhibit B. If so, Bidder 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: BidderName_ISSUES.pdf. Note, however, that OSOS reserves the right not to modify the contract and to award the contract on the basis of a Bidder's willingness to agree to the contract attached as Exhibit B.

(NOT SCORED)

BIDDER'S DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS

[IF APPLICABLE]

No form is provided for this submittal. This is a required submittal ONLY IF Bidder will be using subcontractors to perform the contract. If so, Bidder 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: BidderName_INCLUSIONPLAN.pdf.

(NOT SCORED)

4. EVALUATION AND CONTRACT AWARD

4.1 EVALUATION PROCEDURE

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, to be designated by OSOS, which will determine the ranking of the Proposals. Both the Bidders' responsibility and the responsiveness of their Proposals to this solicitation will be evaluated. In scoring against stated criteria, the evaluation team may consider such factors as accepted industry standards and a comparative evaluation of other Proposals in terms of differing price and quality. These scores will be used to determine the most advantageous Proposal to OSOS.

After receipt of Proposals and prior to the recommendation of an award, OSOS, at its sole discretion, may initiate discussions with one or more Bidders for clarification, and/or select the top-scoring Bidders as finalists for an oral presentation, and/or initiate a best and final offer process.

4.2 RESPONSIBILITY

In determining whether a Bidder is responsible, OSOS will consider (1) the Bidder's ability, capacity, and skill to perform the contract; (2) The Bidder's character, integrity, reputation, judgment, experience, and efficiency; (3) Whether the Bidder can perform the contract within the time specified; (4) the quality of Bidder's performance of previous contracts; (5) The previous and existing compliance by the Bidder with laws relating to the contract; (6) Whether, within the three-year period immediately preceding the date of this RFP, the Bidder 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, any provision of RCW Chapter 49.46, 49.48, or 49.52; and (7) Such other information as may be secured having a bearing on the decision to award the contract.

4.3 RESPONSIVENESS

OSOS will initially classify all Proposals as either "responsive" or "nonresponsive". OSOS may deem a Proposal nonresponsive if: (1) any of the required information is not provided; (2) the submitted price is found to be excessive or inadequate as measured by the RFP

criteria; or (3) the Proposal does not meet RFP requirements and specifications. OSOS may find any Proposal to be nonresponsive at any time during the procurement process. If OSOS deems a Proposal nonresponsive, it will not be considered further. The RFP Coordinator will notify the Bidder by email.

4.4 EVALUATION WEIGHTING AND SCORING

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

Technical Proposal – 50%	100 points
Project Approach/Methodology 25 points (maximum)	
Quality of Work Plan 15 points (maximum)	
Project Schedule 15 points (maximum)	
Project Deliverables 25 points (maximum)	
Management Proposal – 40%	80 points
Project Team Structure/	
Internal Controls 15 points (maximum)	
Staff Qualifications/Experience 25 points (maximum)	
Experience of the Bidder 25 points (maximum)	
Other 15 points (maximum)	
Cost Proposal – 5%	10 points
Executive Order 18-03 Evaluation Preference – 5%	10 points
<hr/>	
Sub-Total	200 points
References (top-scoring Bidder(s) only)	10 points
<hr/>	
GRAND TOTAL	210 POINTS

The score for the cost proposal will be computed by dividing the lowest cost Proposal received by the Bidder’s total cost. Then the resultant number will be multiplied by the maximum possible points for the cost section. References will be contacted for the top-

scoring Bidder(s) only, based on the written Proposal. References will then be scored and included in the Grand Total.

4.5 ORAL PRESENTATIONS

Oral presentations, if considered necessary or desirable, may be utilized in selecting the Apparent Successful Bidder. OSOS, at its sole discretion, may elect to select the top-scoring Bidders from the evaluation of Proposals for an oral presentation and final determination of contract award. The cut-off for the top-scoring Bidders will be based on several considerations, such as responsiveness, qualifications, and competitiveness, suitability of the products and services offered, cost and economy, and the ability of the Bidder to perform. Should OSOS elect to hold oral presentations, it will contact the top-scoring Bidders to schedule a date, time and location. Commitments made by the Bidder in the oral presentation, if any, will be considered binding. The score from the oral presentation will be considered independently and will determine the Apparent Successful Bidder.

4.6 BEST AND FINAL OFFER (BAFO)

Bidders are encouraged to submit their most competitive offer, but there is a potential for a best-and-final offer (BAFO) process. This section defines that process. OSOS reserves the right, any point during the evaluation of Proposals, to notify all remaining responsive and responsible Bidders that OSOS will require them to submit BAFOs. Bidders will not be allowed to make material changes to their Proposals unless they receive a request for a BAFO from OSOS.

The notice will be in writing and will set a specific time and date certain by which the Bidder must submit the BAFO to OSOS. The BAFO notice may set additional conditions and requirements for its submission. The notice will advise Bidders that the BAFO shall be in writing and that following the closing date for submission, OSOS intends to select the highest scoring responsive and responsible Bidder for award. Prior to the closing date for the submission of BAFOs, OSOS may, at its discretion, engage in discussion with any or all remaining Bidders regarding how they can make their Proposals more responsive to the selection criteria in the RFP. All Bidders shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of Proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining BAFOs. In conducting discussions, there shall be no disclosure of any pricing information or other content derived from Proposals submitted by competing Bidders.

For purposes of the BAFO, Bidders may make such changes to their original Proposals as they believe appropriate to enhance their potential for selection and award under the selection criteria set forth in the RFP and the BAFO notice. Changes to the original Proposal

must be clearly identified in the re-submitted Proposal using the Track Changes function in Microsoft Word.

Evaluation of BAFOs and selection of the Apparent Successful Bidder will be based upon the evaluation criteria set out in the RFP. Terms proposed as part of a BAFO must be substantially in accordance with the terms requested in this RFP and may not materially alter the requirements of the RFP. Bidders may be requested to make an oral presentation regarding their BAFO. The evaluation team may accept or reject any information submitted in a BAFO.

Bidders are not required to submit a BAFO and may submit a written response stating that their original Proposal remains as originally submitted. If a BAFO process is initiated, all Bidders that submitted a Proposal will be eligible for a debriefing conference.

At the conclusion of negotiations with the Apparent Successful Bidder, OSOS will require that the Bidder submit a signed contract as a BAFO pending acceptance.

4.7 REQUEST FOR DOCUMENTS

Upon concurrence with the recommendation of the evaluation team, the RFP Coordinator will request from the Apparent Successful Bidder the required documents and information, such as insurance policy documents, contract performance security, an electronic copy of any requested material (e.g., the Proposal, responses to clarification questions), and any other necessary documents. Receipt of this request does not constitute a contract between the Apparent Successful Bidder and OSOS.

4.8 CONTRACT EXECUTION

Upon receipt of all required materials, a contract substantially in the form of the attached Exhibit B will be presented to the Apparent Successful Bidder for signature. The Apparent Successful Bidder will be expected to accept and agree to all material requirements contained in the contract. If the Apparent Successful Bidder does not accept all material requirements, OSOS may move to the next highest scoring Bidder, or cancel the RFP. Work under the contract may begin when the contract is signed by all parties and OSOS has given Bidder a notice to proceed.

4.9 NOTIFICATION TO BIDDERS

Bidders whose Proposals are not selected for further consideration or award will be notified via facsimile or e-mail.

4.10 COMPLAINT, DEBRIEFING AND PROTEST PROCEDURES

This section details the applicable requirements for complaints, debriefs, and protests.

COMPLAINTS. This solicitation offers a complaint period for Bidders wishing to voice objections to this solicitation. The complaint period ends five (5) business days before the proposal due date. The complaint period is an opportunity to voice objections, raise concerns, or suggest changes that were not addressed during the question-and-answer period. Failure by the Bidder to raise a complaint at this stage may waive its right for later consideration. OSOS will consider all complaints, but it is not required to modify or cancel the solicitation. If Bidder complaints result in changes to the solicitation, written amendments to the solicitation will be issued and posted on WEBS and the OSOS website.

1. **CRITERIA FOR COMPLAINT.** A formal complaint may be based only on one or more of the following grounds: (a) The solicitation unnecessarily restricts competition; (b) The solicitation evaluation or scoring process is unfair or flawed; or (c) The solicitation requirements are inadequate or insufficient to prepare a response.

2. **INITIATING A COMPLAINT.** A complaint must: (a) Be submitted to and received by the RFP Coordinator no less than five (5) business days prior to the proposal due date; and (b) Be in writing. A complaint should clearly articulate the basis of the complaint and include a proposed remedy.

3. **RESPONSE.** When a complaint is received, the RFP Coordinator (or designee) will consider all the facts available and respond in writing prior to the deadline for proposal submittals, unless more time is needed. OSOS will promptly post the response to a complaint on WEBS.

4. **RESPONSE IS FINAL.** The RFP Coordinator's response to the complaint is final and not subject to administrative appeal. Issues raised in a complaint may not be raised again during the protest period. Furthermore, any issue, exception, addition, or omission not brought to the attention of the RFP Coordinator prior to Proposal submittal may be deemed waived for protest purposes.

DEBRIEF CONFERENCES. A debrief conference is an opportunity for a Bidder and OSOS to meet and discuss the Bidder's Proposal (and, as further explained below, is a necessary prerequisite to filing a protest). Following the evaluation of the Proposals, OSOS will issue an announcement of the Apparent Successful Bidder. The unsuccessful Bidders will have three (3) business days to request a debrief conference. Once a debrief conference is

requested, OSOS will offer the requesting Bidder one meeting opportunity and notify the Bidder of the debrief conference place, date, and time. Please note, because the debrief process must occur before making an award, OSOS likely will schedule the debrief conference shortly after the announcement of the Apparent Successful Bidder and the Bidder's request for a debrief conference. OSOS will not allow the debrief process to delay the award. Therefore, Bidders should plan for contingencies and alternate representatives. Bidders who wish to protest must first participate in a debrief conference. Bidders who are unwilling or unable to attend the debrief conference will lose the opportunity to protest. Participation in a debrief conference is a prerequisite for a Bidder wishing to file a protest.

1. **TIMING.** A debrief conference may be requested by a Bidder following the announcement of the Apparent Successful Bidder.

2. **PURPOSE OF DEBRIEF CONFERENCE.** Any Bidder who has submitted a timely Proposal may request a debrief conference. A debrief conference provides an opportunity for the Bidder to meet with OSOS to discuss Bidder's Proposal and evaluation. It does not provide an opportunity to discuss the proposals and evaluations of other Bidders.

3. **REQUESTING A DEBRIEF CONFERENCE.** The request for a debrief conference must be made in writing via email to the RFP Coordinator and received within three (3) business days after the announcement of the Apparent Successful Bidder. Debrief conferences may be conducted either in person at the OSOS offices in Olympia, Washington, or virtually (e.g., by telephone or web-based virtual meeting such as Zoom, Skype, MS Teams), as determined by OSOS, and may be limited by OSOS to a specified period of time. The failure of a Bidder to request a debrief conference within the specified time and attend a debrief conference constitutes a waiver of the right to submit a protest. Any issue, exception, addition, or omission not brought to the attention of the RFP Coordinator before or during the debrief conference may be deemed waived for protest purposes.

PROTESTS. Following a debrief conference, a Bidder may protest the contract award(s).

1. **CRITERIA FOR A PROTEST.** A protest may be based only on one or more of the following: (a) Bias, discrimination, or conflict of interest on the part of an evaluator; (b) Error in computing evaluation scores; or (c) Non-compliance with any procedures described in the solicitation.

2. **INITIATING A PROTEST.** Any Bidder that participates in a debrief conference may protest an award to the Apparent Successful Bidder. A protest must: (a) Be submitted to and received by the Protest Officer specified below, within five (5) business days

after the protesting Bidder's debrief conference (see Form and Substance, and Other below); (b) Be in writing; (c) Include a specific and complete statement of facts forming the basis of the protest; and (d) Include a description of the relief or corrective action requested.

3. PROTEST RESPONSE. After reviewing the protest and available facts, the Protest Officer will issue a written response within ten (10) business days from receipt of the protest, unless additional time is needed.

4. DECISION IS FINAL. The protest decision is final and not subject to administrative appeal. If the protesting Bidder does not accept the protest response, the protesting Bidder may seek relief in Thurston County Superior Court.

COMMUNICATION DURING COMPLAINTS, DEBRIEFS, AND PROTESTS. All communications about this solicitation, including complaints, debriefs, and protests, must be addressed to the RFP Coordinator unless otherwise directed.

FORM, SUBSTANCE, & OTHER. All complaints, requests for debrief, and protests must:

- Be in writing
- Be signed by the complaining or protesting Bidder or an authorized agent, unless sent by email
- Be delivered within the applicable time frame(s) outlined herein
- Identify the solicitation number
- Conspicuously state "Complaint," "Debrief," or "Protest" in any subject line of any correspondence or email; and
- Be sent to the address identified below

All complaints and protests must (a) State all facts and arguments on which the complaining or protesting Bidder is relying as the basis for its action; and (b) Include any relevant documentation or other supporting evidence.

HOW TO CONTACT OSOS.

1. TO SUBMIT A COMPLAINT. Send an email message to the RFP Coordinator listed in this solicitation. The email message must include "Complaint" in the subject line of the email message. Alternatively, mail the complaint to the RFP Coordinator at the following address:

Attn: Jim Webster, RFP Coordinator
Office of the Secretary of State
PO Box 40224

Olympia, WA 98504-0224

2. TO REQUEST A DEBRIEF CONFERENCE. Send an email message to the RFP Coordinator listed in this solicitation. The email message must include “Debrief” in the subject line of the email message.

3. TO SUBMIT A PROTEST. Send an email message to the RFP Coordinator listed in this solicitation. The email message must include “Protest” in the subject line of the email message. Alternatively, mail the protest to the RFP Coordinator at the following address:

Attn: Jim Webster, RFP Coordinator
Office of the Secretary of State
PO Box 40224
Olympia, WA 98504-0224

5. RFP EXHIBITS

- Exhibit A-1. Bidder’s Certifications
- A-2. Bidder’s Profile & References
- Exhibit B. Contract