

REQUEST FOR PROPOSAL

#1556-535

Project Title: Mobile Device Management and Secure Text Messaging (MDM-STM) Project

Estimated Contract Period: May 1, 2015 through June 30, 2016. Amendments extending the period of performance, if any, shall be at the sole discretion of DSHS.

Proposal Due Date: All Proposals must arrive by 3:00 p.m. Pacific Standard time on March 18, 2015.

Submit Proposal To:

Proposal Delivered by Mail:
Sarah MacLean, RFP Coordinator
Department of Social and Health Services
Operations Support & Services Division
Central Contracts and Legal Services
PO BOX 45811
Olympia, WA 98504-5811

Proposal Delivered by Express / Hand Delivery, Or Courier:
Sarah MacLean, RFP Coordinator
Department of Social and Health Services
Operations Support & Services Division
Central Contracts and Legal Services
1115 S. Washington St.
Olympia, WA 98504

Proposal Delivered Electronically:
Sarah MacLean, RFP Coordinator
maclesr@dshs.wa.gov

Procurement Website: <http://www.dshs.wa.gov/ccs>
WEBS: <https://fortress.wa.gov/ga/webs/>

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SECTION A. SUMMARY OF PROJECT

1. Purpose of Request for Proposal

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified bidders and establish a contract between the state of Washington, Department of Social and Health Services, hereafter called "DSHS," and one qualified vendor to provide Secure Text Messaging services to protect DSHS's communication, data and applications stored in or being transmitted through mobile devices. The proposed solution will be an integral part of the internal communication processes at DSHS. The system must be available to initiate and deliver messages 24 hours a day, seven days a week, and 365 days a year. The proposed solution must also provide the ability of retaining (storing), searching and producing (for public records requests, litigation discovery, employee investigations, audits, and/or other business purposes) data residing or transmitted through mobile devices.

Bidders must submit a written proposal to respond to this RFP. Bidders must comply with all mandatory requirements of this RFP, or DSHS may reject your proposal as nonresponsive.

See "**Section 7 – Definitions**" for the meaning of various terms used in this RFP.

2. Background

The mission of DSHS is "*Transforming Lives*" by improving the safety and health of individuals, families and communities by providing leadership and establishing and participating in partnerships. DSHS is comprised of an Executive Office and eight Service Administrations. Each administration, through their divisions, offices and institutions, provides specialized services to Washington State citizens in need. The key to accomplish our mission is our employees:

- DSHS has approximately 17,000 employees, of the 17,000 approximately 3,812 employees are assigned a mobile device.
- DSHS anticipates a 5 percent mobile device growth per year for the next five years.
- Employees are located statewide in approximately 220 facilities.
- Employees use mobile devices to communicate with other state employees, business partners and clients.
- Communication and information transmitted through mobile devices is often confidential information including, but not limited to, Federal Tax Information (FTI), Health Insurance Portability and Accountability Act of 1996 (HIPAA), Protected Health Information (PHI) and other protected client, vendor and employee information. Data transmission often includes pictures, voice or video files.

- DSHS must ensure protection of the department's data, through encryption, with granular controls to prevent confidential data from being compromised.
- Data stored or transmitted through mobile devices must be retained (stored), searched and produced for public records requests, litigation discovery, employee investigations, audits and/or other business purposes.
- Data stored on mobile devices is subject to various state and agency retention schedules and must retain integrity and accessibility during that period.
- DSHS only permits the use of state owned devices for business purposes.

3. Project Scope

The intent for this procurement is for the successful bidder to enter into a contract with DSHS to provide Secure Text Messaging services. The key objectives for DSHS in implementing a Secure Text Messaging service solution include:

1. Ability to encrypt text messages in transit, which includes internal and external communications.
2. Ability to retain text messages, which includes internal and external communications.
3. Ability to search text messages, which includes internal and external communications.
4. Ability to produce text messages for public records requests and discovery, and for other business purposes, which may include internal and external communications.

DSHS is committed to having a Secure Text Messaging solution that is functional, user friendly, accessible, reliable, and cost effective. This will assist DSHS in determining the best system for current and future needs. The targeted goal is to have the solution fully operational by August 15, 2015 or earlier if possible.

4. Minimum Qualifications

The proposed Bidder's application software or system is currently in production and has been for a minimum of three (3) years in the United States (U.S.) public sector and/or health organizations similar in size and complexity when compared to DSHS. The current release of the software is operational and in production. The Secure Text Messaging solution has been delivered in at least three (3) U.S. public sector and/or health organizations not including the Bidder's organization.

U.S. public sector experience includes but is not limited to state and federal

government, city, counties, state universities and colleges, school districts, ports or other municipalities. Health organizations experience includes but is not limited to hospitals, clinics, and other health facilities.

Bidders who do not meet these minimum qualifications shall be deemed non-responsive and will not receive further consideration.

5. **Auxiliary Aids and Services**

DSHS will provide access to this RFP document to individuals with disabilities. Please contact the RFP Coordinator to request auxiliary aids and services for this RFP.

If an individual believes that the department has discriminated on the basis of a disability, please contact the DSHS Investigations Unit (IU) for the Nondiscrimination Policy Brochure and complaint process. The brochure can be found at <http://www.dshs.wa.gov/pdf/Publications/22-171.pdf>.

6. **Minority & Women's Business Enterprises (MWBE) and Veteran-Owned Business Enterprises**

In accordance with the legislative findings and policies set forth in RCW 39.19, 43.60A.200, and 39.29.052, the State of Washington encourages participation by veteran-owned business enterprises and Minority- & Women-Owned Business Enterprises (MWBE), either self-identified or certified by, respectively, the Department of Veterans Affairs or the Office of Minority & Women's Business Enterprises (OMWBE). While the State does not give preferential treatment, it does seek equitable representation from the veterans, minority and women's business communities.

Participation by veteran-owned and MWBE contractors may be either on a direct basis in response to this RFP or as a subcontractor to a contractor. However, no preference will be given in the evaluation of Bids, no minimum level of MWBE or veteran-owned business participation shall be required, and Bids will not be evaluated, rejected, or considered non-responsive on that basis.

Bidders may contact the Office of Minority & Women's Business Enterprises (OMWBE) at <http://www.omwbe.wa.gov/index.shtml> and/or the Department of Veterans Affairs at <http://www.dva.wa.gov/BusinessRegistry/default.aspx> to obtain information on certified firms for potential sub-contracting arrangements or for information on how to become certified.

Nothing in this section is intended to prevent or discourage participation from non-MWBE firms or non-veteran-owned businesses.

7. **Definitions.** The following terms which appear in this RFP have the meaning that is defined below for the purposes of this RFP:

- a. **Apparently Successful Bidder** – A Bidder selected as having submitted a successful Proposal, based on the final determination of DSHS management taking into consideration the Bidder's final Proposal score and which

Proposal(s) best meet the needs of DSHS. The Bidder is considered an "Apparently" Successful Bidder until a contract is finalized and executed.

- b. Agency – The Department of Social and Health Services is the agency of the State of Washington that is issuing this RFP.
- c. Bidder – An individual, organization, public or private agency, or other entity submitting a Proposal in response to this RFP.
- d. Confidential Information/Data – Information/data legally protected by federal or state laws.
- e. Contractor – Individual or Company whose Proposal has been accepted by the Agency and is awarded a fully executed, written contract.
- f. Employee – An individual working in the classified service. See [WAC 357-01-140](#).
- g. Issue – To mail, post, or otherwise release this RFP as a public document to interested parties.
- h. Key Personnel – Staff being proposed to do the work under this Proposal.
- i. Proposal – All material prepared and assembled by a Bidder, and which the Bidder submits in response to this RFP.
- j. Protest – An objection by the Bidder, in writing, protesting the results of this RFP, and which complies with all requirements of this RFP.
- k. RCW – Revised Code of Washington. (All references to RCW chapters or sections shall include any successor, amended, or replacement statute.)
- l. Requirements – MR – A mandatory requirement (MR) is an essential DSHS need that must be met by the bidder. Mandatory requirements are scored as pass or fail. DSHS will eliminate from the evaluation process any bidder not fulfilling all mandatory requirements or not presenting an acceptable alternative.
- m. Requirements – SR – A scored requirement (SR) is an essential DSHS need that must be met by the bidder. Bidders are required to respond to all scored requirements. Because scored requirements represent the minimum acceptable level DSHS will accept; they are evaluated and scored on a scale as defined in the section of this solicitation document entitled Evaluation Points.
- n. RFP – Request for Proposals; i.e., this RFP document.
- o. RFP Coordinator – The person named in this RFP as the RFP Coordinator, or the RFP Coordinator's designee within Central Contract Services. The sole point of contact within DSHS regarding this RFP for potential Bidders and other interested parties.

- p. State – The Washington State (or the state of Washington).
- q. Statement of Work – A statement of the work or services which the Contractor is to perform under any contract awarded, and which is generally in the form of an exhibit attached to the contract.
- r. Submit – To deliver to the DSHS RFP Coordinator any of several documents described in this RFP and in the manner specified in this RFP.
- s. WAC - Washington Administrative Code. (All references to WAC chapters or sections shall include any successor, amended, or replacement regulation.)
- t. WEBS – Washington’s Electronic Business Solution. DSHS encourages all bidders to register with WEBS at <https://fortress.wa.gov/ga/webs/>.

SECTION B. PROCUREMENT PROCESS

1. Procurement Contact Information

Upon release of this RFP, all communications concerning this RFP must be directed only to the RFP Coordinator listed below. Any communication directed to DSHS staff or consultants, other than the RFP Coordinator, may result in disqualification.

Contact: Sarah MacLean, DSHS RFP Coordinator
Department of Social & Health Services
Operations Support & Services Division
Central Contracts and Legal Services

Mailing Address: P.O. Box 45811
Olympia, WA 98504-5811

Physical Address: 1115 S. Washington Street
Olympia, WA 98504

Telephone: (360) 664-6050

E-mail Address: maclesr@dshs.wa.gov

2. Acceptance of RFP Terms

The Bidder acknowledges that the submission of a Proposal which includes a signed Bidder Certification and Assurances Form, attached as Exhibit A, constitutes a binding offer.

3. Procurement Schedule

The Procurement Schedule outlines the tentative schedule for important action dates and times. All dates after the proposal submission due date are approximate and may be adjusted as conditions indicate, without amending this document. It is the Bidder's sole responsibility to periodically check the DSHS procurement website, and/or WEBS, for amendments to this document.

Figure 1. PROCUREMENT SCHEDULE

Item	Action	Date
1.	DSHS Issues RFP	February 12, 2015
2.	Bidder may submit written questions and comments until 3:00 p.m. Pacific Time	February 25, 2015
3.	DSHS will Issue responses	March 2, 2015
4.	Bidders may submit written complaints by 3:00 p.m. Pacific Time.	March 18, 2015
5.	Bidder must submit Proposal by 3:00 p.m. Pacific Time	March 27, 2015
6.	DSHS evaluation of Proposals	April 6, 2015 – April 9, 2015
7.	Bidder Oral Presentations if determined to be necessary by DSHS	April 14, 2015 – April 15, 2015
8.	DSHS notifies Apparently Successful Bidder and begins contract negotiations	April 16, 2015
9.	DSHS notifies unsuccessful Bidders	April 16, 2015
10.	Bidders may request Debriefing until 3:00 p.m. Pacific Time	April 21, 2015
11.	DSHS holds debriefing conferences, if requested	April 22, 2015
12.	Unsuccessful Bidders may submit Protest(s) until 5:00 p.m. Pacific Time	April 29, 2015
13.	DSHS considers and responds to any Protests	April 30, 2015
14.	Contract Execution	Anticipated May 1, 2015

4. Contract

DSHS intends to award **one contract** to provide the services described in this RFP.

The projected term of the Contract will be **14 (fourteen) months** commencing **May 1, 2015** or upon the start date or execution date, whichever is later, through **June 30, 2016**. Amendments extending the period of performance, if any, shall be at the sole discretion of DSHS. The term of the contract may be extended by amendment four (4) times for up to one (1) year per amendment.

Additional services that are appropriate to the scope of this RFP, as determined by DSHS, may be added to the resulting contract by a written amendment mutually agreed to and executed by both parties.

5. Ethics

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

In addition, as described in Section C.1, *Administrative Requirements*, below, Bidders must include, in their Letter of Submittal, a list identifying any current or former state employees who are employed by, or subcontracted with, Bidder. The list must include the name of the employee or subcontractor, the individual's employment history with the State of Washington, and a statement of the individual's involvement with the response to, or their proposed role in providing the services under a contract resulting from this solicitation.

If the Bidder has no employees or subcontractors that are current or former employees of the state of Washington, then the Letter of Submittal should so state.

6. Insurance

The Apparently Successful Bidder must comply with the insurance requirements identified in the sample contract attached hereto as an exhibit.

7. Proprietary information/public records requests

Materials submitted in response to this RFP shall become the property of DSHS and the proposals shall be deemed public records as defined by RCW 42.56.

The Bidder's Proposal must include a statement on the Letter of Submittal identifying the pages of its Proposal, if any, which contain information the Bidder considers proprietary. Each page claimed to be proprietary must be clearly marked by stating the word "Proprietary" on the lower right hand corner. Bidders must be reasonable in designating information as proprietary or confidential. **Bidders may not mark their entire Proposal proprietary. Doing so will not be honored and will disqualify your Proposal from further consideration.**

If DSHS receives a request to view or copy a Bidder's Proposal, DSHS will respond according to applicable law and DSHS's policy governing public records requests. DSHS will not produce any information marked "Proprietary" in a Proposal without giving the Bidder ten (10) days notice to seek relief in superior court per RCW 42.56.540.

Do not include any DSHS client information in your proposal. Doing so will disqualify your proposal from further consideration. If you wish to include examples of any forms or processes, use a blank form or ensure client information is redacted.

8. Communications

All communications concerning this RFP must be directed only to the RFP Coordinator. Any communication directed to DSHS staff or consultants, other than the RFP Coordinator, may result in disqualification. Proposals should be based on the material contained in this RFP, any related amendment(s), and any questions and answers directed through the RFP Coordinator.

9. Questions and Answers

Bidders may e-mail or mail written questions to the RFP Coordinator. Questions will be accepted until the date set forth in the Procurement Schedule. Early submission of questions is encouraged. Questions and answers will be posted on the DSHS Procurement website. Bidders may only rely on written statements Issued by the RFP Coordinator. Any oral communications are unofficial and are not binding on DSHS.

10. Bidder Comments Invited

Bidders are encouraged to review the mandatory requirements of this RFP carefully, and submit any comments and recommendations to the RFP Coordinator. Where mandatory requirements appear to prohibit or restrict participation by your organization or firm, an explanation of the issue with suggested alternative language should be submitted in writing to the RFP Coordinator by the deadline for Bidders Questions and Comments set forth in the *Procurement Schedule* (Section B.3).

11. Bidder Complaints Regarding Requirements

Bidders may submit any complaints they have concerning the RFP requirements up to 5 business days prior to the bid response deadline. Bidders may submit specific complaints to the RFP Coordinator if the Bidder believes the RFP unduly constrains competition or contains inadequate or improper criteria. The complaint must be made in writing to the RFP Coordinator before the Bidder Complaints due date set forth in the *Procurement Schedule* (Section B.3) and must clearly articulate the basis for the complaint as well as include a proposed remedy. The solicitation process may continue.

These complaints will **not** be handled through the protest procedures outlined in Section B.26 *Protest*; however, the RFP Coordinator will forward a copy of the complaint to the DSHS Contracts Administrator. Should a Bidder complaint identify a change that would be in the best interest of DSHS to make, DSHS may modify this RFP accordingly. The DSHS decision is final; no further administrative appeal is available.

12. RFP Amendments

DSHS reserves the right, at any time before execution of a contract, to amend all, or a portion, of this RFP. Amendments will be posted on the DSHS Procurements Web site and/or WEBS. If there is any conflict between amendments or between an amendment and this document, whichever document was issued last in time shall be controlling.

13. Retraction of this RFP

DSHS reserves the right to retract this RFP in whole, or in part, at any time without penalty.

14. Response Preparation Requirements

a. Mandatory and Scored Requirements

The Acquisition is organized by subject matter. For each section there are Mandatory and Scored Requirements. In order for a Bidder to be considered for this effort, it must meet all Mandatory Requirements. All Mandatory Requirements, denoted with an "MR" appear on the requirement heading line.

(1) Mandatory Requirement

A mandatory requirement (MR) is an essential DSHS need that must be met by the Bidder. Mandatory requirements are scored as pass or fail. DSHS will eliminate from the evaluation process any Bidder not fulfilling all mandatory requirements or not presenting an acceptable alternative.

Failure to meet a mandatory requirement is ground for disqualification and shall be established by any of the following conditions:

- The Bidder states that a mandatory requirement cannot be met.
- The Bidder fails to include information requested by DSHS or necessary to substantiate that a given mandatory requirement has been met. Supplemental material may be referenced, but the answer must be complete in itself. An answer of "will comply" is not sufficient substantiation.
- Responses must indicate present capability. Representations that future development will satisfy the requirement are not sufficient.
- The Bidder presents the information requested by this solicitation

document in a manner inconsistent with the instructions stated by any portion of this solicitation document.

- Customer references, site visits, or other investigative practices identify the Bidder's inability to comply with one or more of the mandatory requirements.

(2) Scored Requirement

All scored requirements, denoted with "SR" appear on the requirement heading line. A scored requirement (SR) is an identified DSHS need that must be responded to by the Bidder. Bidders are required to respond to all scored requirements. Since scored requirements represent the minimum level DSHS will accept, they are evaluated and scored on a scale as defined in the section of this solicitation document entitled "Evaluation Points."

Evaluations are based only upon the quality of the proposed solution described in the response to this solicitation document. Evaluators will be instructed to score only upon the content of the response and not upon any knowledge obtained through prior experience with the Bidder or with Bidder presentations and documentation provided prior to the release of this document.

It is in the Bidder's best interest, therefore, to be thorough and fully responsive in preparing its solutions (answers) to these requirements. Failure of the Bidder to respond to any one scored requirement will result in the Bidder receiving a score of zero (0) or no score for that part of their response.

A scored requirement will receive zero (0) if the Bidder fails to include documents or references requested by DSHS.

15. Submission and Contents of Proposals

a. Submission of Proposal

Proposals must be prepared and submitted in their entirety no later than the proposal submission date and time specified in the Procurement Schedule. The Proposal must be sent to the RFP Coordinator electronically as an attachment to an email using the email address specified in Section B.1, Procurement Contact Information.

The email subject line must identify the email as "Response to RFP #1556-535."

The "receive date/time" shown on the DSHS email system will be used as the official time stamp but may not reflect the actual time received.

Bidders should allow sufficient time to ensure timely receipt by the RFP Coordinator. DSHS will disqualify any Proposal and withdraw it from consideration if it is received after the proposal submission due date and time.

DSHS assumes no responsibility for delays caused by Bidder's e-mail, network problems, or any other party.

Please contact the RFP Coordinator if you wish to arrange an alternative submission method. **No other submission methods will be accepted unless agreed to by the RFP Coordinator in writing prior to the Proposal deadline.**

All Proposals and any accompanying documentation and material become the property of DSHS and will not be returned.

Acceptable Electronic Formats (Software) for Submission of Offers

- (1) Files must be formatted in Portable Document Format (Adobe Acrobat PDF) or Microsoft Office 2010 and lower versions of Microsoft Word, Excel, or PowerPoint.
- (2) **Spreadsheet documents must** be submitted in Microsoft Excel and in a live, **unprotected** file that includes all formulas, macros, and computations that are relied on or used to calculate any rates or values presented therein.
- (3) When scanning documents to be submitted in PDF format, scanner resolution should be set to at least 200 dots per inch.
- (4) Other electronic format. If you wish to submit an offer using any format other than described here, email the RFP Coordinator who issued the solicitation. Please submit your request at least ten (10) calendar days before the scheduled closing date of the solicitation. Request a decision as to the format acceptability and make sure you receive approval of the alternate format **before** using it to send your proposal.
- (5) Please note that we cannot accept compressed or ".zip" files due to security concerns.

NOTE: DSHS cannot receive emails that are larger than 30MB. To keep file sizes to a minimum, Bidders are cautioned not to use unnecessary graphics in their proposal. If your Proposal approaches or exceeds 30MB, you must break it up and send it by more than one email so that no single email exceeds 30MB.

b. Format of Proposal

- (1) The Bidder must use a font size of 12 or larger.
- (2) Proposals must address the sections of this RFP in the same order as presented here, with the same headings.
 - (a) Table of Contents
 - (b) Section 1: Administrative Requirements

(c) Section 2: Technical Proposal

(d) Section 3: Management/Experience and Qualifications Proposal

(e) Section 4: Cost Proposal

16. Non-responsive Proposals

All Proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. DSHS may reject or withdraw a Proposal at any time as nonresponsive for any of the following reasons:

- a. Incomplete Proposal
- b. Submission of a proposal that proposes services that deviate from the technical requirements set forth in this document
- c. Failure to comply with any part of this RFP or any exhibit to this RFP
- d. Submission of incorrect, misleading, or false information

17. Errors and Omission in Proposals

DSHS will not be liable for any error or omissions in the Bidder's proposal. Bidders will not be allowed to alter or supplement their proposal documents after the proposal due date unless the alterations are the result of a request by DSHS as noted below:

DSHS reserves the right to make corrections or amendments to the response due to errors identified by DSHS or the Bidder. This type of amendment will only be allowed for such errors as typing, transposition, omission, or any other obvious error. Any changes will be date and time stamped and attached to responses. All changes must be coordinated in writing with, authorized by, and made by the Procurement Coordinator. Bidders are liable for all errors or omissions contained in their response.

18. Minor Irregularities

DSHS may waive minor administrative irregularities related to any Proposal.

19. Cost to Prepare Proposal

DSHS will not be liable for any costs incurred by the Bidder in preparing, submitting, or presenting a Proposal for this RFP.

20. Joint Proposals

If Bidders submitted a joint Proposal, with one or more other Bidders, the Bidders must designate the prime Bidder. The prime Bidder will be DSHS sole point of contact, will sign the contract and any amendments, and will bear sole responsibility for performance under the contract.

21. Acceptance Period

The Bidder must certify in writing that all Bidder response terms, including prices, will remain in effect for a minimum of one-hundred-eighty (180) days after the response due date and continue through the term of the contract. The BIDDER CERTIFICATIONS AND ASSURANCES FORM attached as Exhibit A to this solicitation document, is provided for certification purposes and must be completed and filed as part of the Bidder's Response. Proposals providing less than the required number of days for acceptance by DSHS will be considered non-responsive and will be rejected.

22. Exhibits

Exhibits to this RFP are:

- Exhibit A – Bidder Certifications and Assurances Form
- Exhibit B – Sample Contract
- Exhibit C – Contractor Intake Form
- Exhibit D – Financial Proposal Spreadsheet
- Exhibit E – DSHS IT Security Policy Manual

Bidders should download a complete copy of this RFP and all attached exhibits, as listed above, with the exception of Exhibit E. The procurement documents can be accessed at <http://www.dshs.wa.gov/ccs> or WEBS at <https://fortress.wa.gov/ga/webs/>. Bidders who experience difficulty downloading the documents should contact the RFP Coordinator.

To request a copy of Exhibit E, the Bidder should contact the Procurement Coordinator via e-mail at maclesr@dshs.wa.gov. You may be required to execute a non-disclosure agreement before receiving a copy.

Is not a ground for protest if your copy of this solicitation document should be missing any exhibit or pages of the solicitation document.

23. Withdrawal of Proposals

After a Proposal has been submitted, a Bidder may withdraw its Proposal at any time up to the proposal submission date and time specified in the Procurement Schedule. A written request to withdraw the Proposal, signed by an authorized representative of the Bidder, must be submitted to the RFP Coordinator. After withdrawing a Proposal, the Bidder may submit another Proposal at any time up to the proposal submission date and time.

24. Notify Bidders

DSHS will notify the Apparently Successful Bidder in writing of its selection on or about the date and time specified in the Procurement Schedule, via mail or email. DSHS will also notify unsuccessful Bidders on or about the date and time specified in the Procurement Schedule.

25. Bidder Debriefing Conference

All Bidders may request a debriefing conference by submitting a request in writing to the RFP Coordinator by mail or email by the date and time specified in the Procurement Schedule.

Debriefing conferences will be held in accordance with the Procurement Schedule. A debriefing conference may, at DSHS's option, be conducted either in person or by telephone and is limited to a maximum of one hour in length.

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

- Critique of Proposal based on evaluators' comments; and
- Review of final score in comparison with other Bidders' final scores without identifying the other Bidders.

DSHS will not identify the other Bidders or allow review of their Proposals or evaluations during debriefing.

26. Protest

In order to Submit a Protest under this RFP, a Bidder must have submitted a Proposal for this RFP, and must have requested and participated in a debriefing conference.

This protest process is the sole administrative remedy available within DSHS. The following is the process for filing a Protest:

a. Grounds for Protest. A Protest may be made based on these grounds only:

- (1) Mathematical errors were made by DSHS in computing the score;
- (2) DSHS failed to follow the procedures established in this RFP document, or to follow applicable State or federal laws or regulations; or
- (3) Bias, discrimination, or conflict of interest on the part of an evaluator.

b. Protest Form and Content

A Protest must state all of the facts and arguments upon which the Protest is based, and the grounds for the Protest. It must be in writing and signed by a person authorized to bind the Bidder to a contractual relationship. At a minimum, the Protest must include:

- (1) The name of the protesting Bidder, mailing address and phone number, and the name of the individual responsible for submission of the Protest;
- (2) The RFP number and title;
- (3) A detailed and complete statement of the specific action(s) by DSHS under protest;
- (4) The grounds for the Protest;
- (5) Description of the relief or corrective action requested.

Bidders may attach to their Protest any documentation they have to offer in support.

c. Submitting a Protest

Protests must be in writing and must be signed. Bidders must mail or hand-deliver their Protest to the RFP Coordinator. Protests may not be submitted by fax or email. DSHS must receive the written Protest within five (5) business days after the debriefing conference.

d. Protest Process

The RFP Coordinator will forward the Protest to the DSHS designated Protest Coordinator with copies of the following:

- (1) This RFP and any amendments,
- (2) The protesting Bidder's Proposal,
- (3) The evaluators' scoring sheets, and
- (4) Any other documents showing evaluation and scoring of the Proposal in question.

DSHS will follow these procedures in reviewing a Protest:

- (1) DSHS will conduct an objective review of the Protest, based on the contents of the written Protest and the above materials provided by the RFP Coordinator.
- (2) DSHS will send the Protestor a written decision within five (5) business days after DSHS receives the Protest, unless more time is required to review the Protest and make a determination. The protesting Bidder will be notified by the RFP Coordinator if additional time is necessary.

DSHS will make a final determination of the Protest and will either:

- (1) Find that the Protest lacks merit and uphold DSHS's actions;
- (2) Find that any errors in the RFP process or in DSHS's conduct did not

influence the outcome of the RFP, and uphold DSHS's actions; or

- (3) Find merit in the Protest and provide options for corrective action by DSHS which may include:
 - (a) That DSHS corrects any errors and re-evaluate all Proposals affected by its determination of the Protest;
 - (b) That DSHS reissues the RFP document; or
 - (c) That DSHS makes other findings and take such other action as may be appropriate.

27. Execution of the Contract

The Apparently Successful Bidder is expected to sign a contract with DSHS and any subsequent amendments that may be required to address specific work or services as needed. A sample contract is attached as Exhibit B.

DSHS reserves the right to negotiate the specific wording of the Statement of Work, based on the requirements of this RFP and the terms of the winning Proposal.

If the Apparently Successful Bidder fails or refuses to sign the contract or any subsequent amendment within ten (10) business days of delivery, DSHS may elect to cancel the award and may award the contract to the next-highest ranked finalist.

Any subcontracts necessary to perform the contract shall be subject to the prior written approval of DSHS.

The Apparently Successful Bidder will be required to sign a non-disclosure agreement (NDA) upon contract execution.

28. Use of Facilities

DSHS will provide a reasonable work place environment in the Olympia vicinity for Bidder's personnel on assignment to the contract. This facility will include office space and individual workstation furniture, telephones, and access to copy and facsimile machines.

The Bidder must provide personal computers, computer workstations, and software to be used by the Bidder. DSHS will provide local area network access and e-mail.

Any resources provided by DSHS for the Bidder's convenience shall be and shall remain the property of DSHS. Bidder's personnel will use the telephone and other equipment in accordance with procedures established for DSHS personnel. Access to the State's SCAN network for long distance calls can be provided.

The Bidder will be required in the Contract to use the facilities, resources, and equipment for authorized Contract related activities, to comply with DSHS standards and practices pertaining to physical security and access control, and to comply with data security and integrity standards. Bidder will be required to reimburse DSHS for photocopy and telephone expenses.

The Bidder will be required to pay for parking.

SECTION C. PROPOSAL CONTENTS

The Bidder must answer all questions and must include all items requested in the order requested for the Proposal to be considered responsive. The Bidder must address every section of the RFP, even though certain items may not be scored.

1. **Administrative Requirements (Section 1 of Proposal)**

This section sets forth the requirements for the Administrative Requirement Response. The Bidder must respond to all items designated (MR) or (SR).

The response must provide sufficient information for each designated item to enable the evaluator to judge the quality of the response. Scores will be awarded based upon the content of the answer to each individual designated item, and where appropriate, information provided by references or evaluator follow-up of items in question.

The Bidder must respond to each item in the same order in which they appear.

a. Letter of Submittal (MR)

Bidders must include a signed Letter of Submittal on Bidder's official business letterhead stationery as the first page of Section 1. Signing the Letter of Submittal indicates that the Bidder accepts the terms and conditions of RFP #1556-535.

The Bidder's Letter of Submittal must include the following:

- (1) Name, address, principal place of business, telephone number, fax number, and e-mail address of legal entity or individual with whom contract would be written;
- (2) The name of the contact person for this RFP;
- (3) A detailed list of all materials and enclosures included in the Proposal;
- (4) A list of all RFP amendments downloaded by the Bidder from the DSHS Procurements Web site and/or WEBS, if applicable, and listed in order by amendment number and date. If there are no RFP amendments, the Bidder must include a statement to that effect;
- (5) A statement substantiating that the person who signs the letter is authorized to contractually bind the Bidder's firm;
- (6) Identification of the page numbers on the Bidder's Proposal that are marked "Proprietary or Confidential" Information;

A list identifying any current or former state employees who are employed by, or subcontracted with, Bidder. The list must include the name of the employee or subcontractor, the individual's employment history with the

State of Washington, and a statement of the individual's involvement with the response to, or their proposed role in providing services under a contract resulting from this solicitation.

If the Bidder has no employees or subcontractors that are current or former employees of the state of Washington, then the Letter of Submittal must so state; and

(7) Any statements describing variations between the Bidder's Proposal and the requirements of this RFP.

(8) Prior Contract Performance

Bidders must submit full details of all Terminations for Default that have been experienced by the Bidder in the past five (5) years, including the other party's name, address, and telephone number.

"Termination for Default" is defined as notice to Bidder to stop performance due to the Bidder's non-performance or poor performance and the issue was either: (a) not litigated; or (b) litigated and such litigation determined the Bidder to be in default.

Bidders must describe the deficiencies in performance, and describe whether and how the deficiencies were remedied. Bidders must present any other information pertinent to its position on the matter. Bidders must present any such information in its completion of the Bidder's Letter of Submittal.

DSHS will evaluate the information and may, at its sole discretion, reject the Bidder's proposal if the information indicates that completion of a Contract or Work Order resulting from this RFP may be jeopardized by selection of the Bidder. If the Bidder has experienced no such Terminations for Default in the past five years, the Bidder must so declare in the Bidder's Letter of Submittal.

b. Bidder Certification and Assurances Form (MR)

Bidders must submit a completed BIDDER CERTIFICATION AND ASSURANCES FORM, Exhibit A. Please sign and include any attachments that are necessary.

c. Contractor Intake Form (MR)

Bidder must submit a completed CONTRACTOR INTAKE FORM, attached as Exhibit C to this solicitation document, signed by an authorized representative of the Bidder. Please include any attachments that are necessary.

d. Subcontractors (MR)

If one or more subcontractors certified by the Office of Minority and Women's Business Enterprises are proposed, the Bidder must set out in the Cost Proposal the portion to be paid to the certified MBE and/or the WBE firm. Costs for subcontractors, which are not certified, are also to be broken out separately.

Bidder must acknowledge and agree to the above condition.

e. Exceptions and/or Proposed Revisions Section (MR)

Bidders are required to include any and all exceptions and/or revisions to the sample contract language as part of their response. DSHS will not consider changes to contract language or negotiate any new language that is submitted after the Bidder's response.

f. Reference Section (MR)

The Bidder must provide a list of at least three (3) references of entities for which the Bidder has performed similar services. The references should include the names, telephone numbers, dates of services, and a brief description of the similar services the Bidder provided them in the past. References will only be contacted for finalist(s).

2. Technical Proposal (Section 2 of Proposal)

General Instructions:

In this section of the Proposal, the Bidder is to describe how the Proposal meets the requirements of the project.

See Section 14, **Response Preparation Requirements** for an explanation of Mandatory and Scored requirements.

Responses:

For each requirement, specify how well the proposed solution meets the requirement by checking the box for **Level of Functionality**. Then in the **Description** column, use the blank space provided to explicitly describe the actions required or the capabilities available to meet the requirement. A general statement that the product will meet the requirement is not sufficient. A reference to another section will not suffice; each answer must stand alone.

You may use the same requirements table provided below, or create your own table using the same format for your response.

Points Awarded for Responses:

The total number of available points is 60 (Does not include MR section).

a. Mandatory Technical Requirements (MR)

Each Mandatory Requirement is an essential DSHS need that must be met by the bidder. Mandatory requirements are scored as pass or fail. DSHS will eliminate from the evaluation process any bidder not fulfilling all mandatory requirements or not presenting an acceptable alternative.

Req. No	Requirement (MR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
1	Ability to send and receive secure messages - initiated by internal user to internal user	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
2	Ability to store message information (metadata), including: - Sender name and/or email - Recipient name and/or email - Sender/recipient phone number - Message date and time	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
3	Ability to transfer off-premise messages and attachments to DSHS on premise repository	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	

Req. No	Requirement (MR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
4	Ability to send and store attachments, such as photos, video, audio, documents, or other files with a message	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
5	Ability to prohibit users from changing text management configuration on devices	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
6	<p>Conformance to external data security requirements: HIPAA, IRS, Family Education Rights Privacy Act (FERPA), etc.</p> <p>Data security requirements apply to metadata as well as to content. Please specify any certifications and how various requirements are met.</p>	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
7	Ability to encrypt stored data to prevent unauthorized access (HIPAA requirement)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
8	Ability to encrypt data "in transit" for internal user to internal user communication (HIPAA requirement)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
9	<p>Ability to log security events required by IRS 1075 and HIPAA related to texting</p> <p>Events to be defined may include: successful login, unsuccessful login, logout, send text, receive text, create/read/update/delete message record or file, etc.</p> <p>HIPAA Security Rule requires logging to the extent that it is possible to provide "sufficient information to establish what events occurred, when they occurred, and who (or what) caused them."</p>	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
10	Exchange 2010 Comparability – The Proposed Secure Text Messaging system solution must be compatible with Exchange 2010.		

Req. No	Requirement (MR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
11	<p><u>Patch Management</u> - The Bidder must have an established and documented patch management process.</p> <p><i>Bidder must explain the Bidder's process.</i></p>	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
12	<p><u>System Up Time</u> – The system must be available to initiate and deliver messages 24 hours a day, seven days a week, and 365 days a year.</p>	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
13	<p><u>Adherence to Security Policies and Standards</u> – The Bidder's System must adhere to current Washington State and DSHS security policies and standards at implementation, and meet any changes within six (6) months of notification by DSHS of changes to these policies and standards. These changes normally occur annually. Washington State IT policies and standards can be found at: https://ocio.wa.gov/policies. For DSHS IT Security policies see Appendix F, DSHS IT Security Policy Manual.</p> <p><i>Bidder must indicate if Bidder agrees to this requirement.</i></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
14	<p><u>Accessibility for Individual with Disabilities</u> – Web-based intranet and Internet information and applications implemented in the state of Washington shall conform to State Guidelines – Accessibility to Information Technology for Individuals with Disabilities at https://ocio.wa.gov/policies/1000-g1-state-guidelines-%E2%80%93-accessibility-information-technology-individuals-disabilities/. The State guidelines are based on section 508 of the federal Rehabilitation Act Standards, as amended (29 U.S.C. 794d) (http://section508.gov) and the World Wide Web Consortium's (W3C)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Req. No	Requirement (MR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
	Web Content Accessibility Guidelines (WCAG) http://www.w3.org/TR/WCAG20/ . At a minimum, the Bidder's System must have W3C WCAG level A conformation. <i>Bidders must indicate if Bidder's system has W3C WCAG level A conformation, and the level of conformation.</i>		

b. Scored Technical Desirable Requirement (SR)

(1) High Priority Desirable Requirement (SR)

Each Scored Requirement (High Priority or Desirable) will be graded on a scale of 0-4, with 4 being the high score. The sum of points received will be converted to a percentage of the total possible (4 x number of scored requirements), then multiplied by the total number of available points to get a final score used in **Scoring of Proposals**.

Example: Sum of points given in particular section: 117

Total points possible (4 points each x number of questions): 156

Percentage of maximum possible points (117 divided by 156): 75%

Available points multiplied by 75%: 45 points for particular section

Req. No	Requirement (SR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
1	Allow text messages to be received from relay service toll-free numbers (TTY)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
2	Capability to preserve other available message metadata for later access (available metadata depends on solution)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
3	Ability to identify and reconstruct messages as part of a continuing conversation (thread)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
4	Ability to store media or other files with associated messages (e.g., video, photos, audio recordings, documents) on premise	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
5	Ability to store messages in a	<input type="checkbox"/> Full	

Req. No	Requirement (SR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
	central repository	<input type="checkbox"/> Partial <input type="checkbox"/> None	
6	Ability to search for messages by sender, recipient, date	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
7	Ability to retrieve, report and sort message information: who (user email, phone), what (content), when (date/time)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
8	Ability to search, retain, and retrieve/reproduce secure messages without having the user's device	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
9	Ability to prevent messages from being deleted from the central repository, except by administrator	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
10	Ability to maintain a standard configuration for DSHS	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
11	Ability to maintain devices on a single software version, currently supported and patched (Information Security policy)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
12	Ability to activate/deactivate text capability for a user of the secure text messaging product	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
13	Ability to send archived messages to the enterprise vault (Symantec) in a form accessible to vault management tools	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
14	Compatibility with existing DSHS/CTS technology infrastructure	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
15	Support for specific operating systems, including: Apple iOS, Android, Windows Phone	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
16	Log security events related to texting in a central repository	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
17	Ability to determine who accessed the activity log on the central repository	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	

Req. No	Requirement (SR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
18	<u>Integration with Microsoft Windows Active Directory</u> – Describe how the MDM solution integrates with Microsoft Windows Active Directory		
19	<u>High Availability</u> – Describe solution's ability to support High Availability configurations		
20	<u>Disaster Recovery</u> – Describe solution ability to support Disaster Recovery configurations		
21	<u>Training for Agency Users and Continuous Support</u> - Bidder is to identify all training courses required to successfully use the proposed system by user type (for example, system administrators and end users) and indicate availability (for example, on site, off site or online), class duration, materials required vs. provided and prerequisite skills.	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
22	<u>Recording Training Sessions</u> – Does the Bidder permit audio and/or video recording of training sessions for reproduction at DSHS discretion?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
23	<u>Copying Training Materials</u> – Does the Bidder permit copying or otherwise reproducing training materials for internal distribution to DSHS users.	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Req. No	Requirement (SR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
24	<p><u>Bidder Performance and Support</u> – DSHS expects the Bidder to provide user and technical support for all supplied software and its operation for the life of the contract.</p> <p>The Bidder is expected to provide 24x7 user and technical support help desk via a 1-800 number.</p> <p>The Bidder will be responsible for coordination and problem resolution. Problem resolution must be in progress within four (4) prime shift hours of initial call.</p> <p>The Bidder must propose a support structure, including a description of its maintenance organization, issue-tracking process, levels of support and problem escalation process.</p> <p><i>Bidder must describe how they would approach the requirements in this section. A detailed description is required.</i></p>		

(2) Desirable Requirements (SR)

These desirable requirements are individually scored on a scale of 0-4, with 4 being the high score. They represent features that are “nice to have.” Bidders are required to respond to all scored requirements.

Des. No	Desirables (SR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
1	Ability to send and receive secure messages - initiated by internal user to external user	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
2	Ability to send and receive secure messages - initiated by external user to internal user	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	

Des. No	Desirables (SR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
3	Ability to encrypt data "in transit" for internal to external or external to internal communications	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
4	Ability to send and receive text messages to/from specified numbers (or to/from non-excluded numbers - whitelist or blacklist)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
5	Ability to block messages from specified numbers	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
6	Ability to send an automatic response message (out of office, warning not secure form of communication, etc.) based on specified conditions	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
7	Ability to identify the location from which a message was sent	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
8	Ability to search for messages by message content	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
9	Ability to search, retain, and retrieve/ reproduce standard SMS/MMS unsecured messages without having the user's device	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
10	Ability to allow users to delete messages from their devices (transitory texts, such as "I'll be late"). Logs must be kept of message deletions.	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
11	Ability to export message records with attachments, if any, to a standard format (spreadsheet, etc.)	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
12	Ability to retain messages for a required retention period	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
13	Ability to make a retention exception for records in litigation hold so they are not deleted	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
14	Ability to assign variable retention periods to different groups, users, or devices	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	

Des. No	Desirables (SR)	Level of Functionality	Description: How does the Bidder's product provide the identified level of functionality?
15	Ability to limit users to agency-issued texting apps	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	
16	<u>Testing Scripts</u> - Does the Bidder have Testing scripts developed for an implementation similar to the complexity identified by this Acquisition that could be used to develop scripts for the user testing phase of the implementation project? If the Bidder has testing scripts, provide an example. If it does not currently have testing scripts, the Bidder must state so.	<input type="checkbox"/> Full <input type="checkbox"/> Partial <input type="checkbox"/> None	

3. Management, Experience and Qualifications Proposal (Section 3 of Proposal)

General Requirements: In this section of the proposal, the Bidder is to discuss project organization and the knowledge, skills, abilities, and experience of the proposed team members. The contract resulting from this procurement will require that any change in key staff (as identified in Bidder's response to this procurement) will be subject to prior DSHS acceptance. The contract will also provide that DSHS may request that Bidder remove selected staff on one (1) day's notice and provide replacement staff without impacting the schedule.

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

Attachments. Attachments must be labeled and tabbed and the question number to which it responds must be indicated.

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

The total number of available points is 20.

a. Staffing Qualifications and Skills (SR)

- Based upon your experience with Secure Text Messaging, provide a detailed listing of the Key Personnel or team you propose for this engagement, including the titles of staff, team roles (if applicable), and a current resume of each person proposed. Resumes must detail experience with the required skills listed in Section A.4., Minimum Qualifications, of this RFP.
- The resumes should include the following: Skills related to this project, education, experience, significant accomplishments and any other pertinent information. DSHS will expect the ASB to staff the project with the individuals described in the response. Any changes to such staffing will be subject to DSHS approval. The Bidder must commit that the staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of DSHS.
- Provide a description of the proposed project staffing organization and how the team will be managed during the course of the project, including any subcontractors. State the name, the title, or position, and telephone number of the individuals who would have primary responsibility for the project resulting from this procurement. Disclose who within the firm will have a prime responsibility and final authority for the work under the proposed contract. Name other individuals providing service on the project.

- Identify responsibilities and qualifications of staff who will be assigned to the potential contract, and the amount of time each will be assigned to the project. 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 program or function of the firm. This chart must also show lines of authority to the next senior level of management.

Scores for this section will be based upon, but not limited to, the soundness of the proposed team members roles and responsibilities, the overall viability of the proposed approach, and the degree to which the proposed staffing approach optimizes the ability to implement projects quickly, ensures the transfer of knowledge to any assigned DSHS staff, and reflects a willingness/ability to partner with DSHS. NOTE: DSHS expects the project to be staffed by the individuals proposed in the Bidder's response.

b. Continuity of Personnel (SR)

- Describe the Bidder's policies, plans, and intentions regarding maintaining continuity of personnel assignments throughout the performance of any contract resulting from this procurement. Address how availability of any of the proposed staff for this project could be impacted from existing contracts to which they are currently assigned or from other potential contracts for which they are proposed. Where such cases exist, identify the priority DSHS would have in cases of conflict. Discuss the Bidder's plans to avoid and minimize the impact of staff changes. Identify planned back-up staff assignments.
- The contract resulting from this procurement will require that any change in key staff (as identified in Bidder's response to this procurement) will be subject to prior DSHS acceptance. The contract will also provide that DSHS may request that Bidder remove selected staff on one (1) day's notice and provide replacement staff without impacting the schedule.

Scores for this section will be based upon, but not limited to, the Bidder's demonstrated commitment to continuity of project staff and the Bidder's ability to maintain staff quality should a change in staff be unavoidable.

c. Bidder Public Sector and/or Health Organization Experience

(1) Public Sector and/or Health Organizations Implementation Experience (MR)

The proposed Bidder must have implemented the proposed Secure Text Messaging solution in production and been for a minimum of three (3) years in the U.S. public sector and/or health organizations similar to size and complexity when compared to DSHS. The current release of the proposed Secure Text Messaging solution is operational and is in production and operation in a least three (3) U.S. public sector and/or

health organizations not including the Bidder's organization.

U.S. public sector experience includes but is not limited to state and federal government, city, counties, state universities and colleges, school districts, ports or other municipalities. Health organizations experience includes but is not limited to hospitals, clinics, and other health facilities.

The Bidder must indicate if it meets this requirement as stated.

(2) Description (SR)

Bidder is to describe how it meets this requirement in no more than one (1) typed page.

Present an in-depth discussion and graphic representation of the Bidder's specific experience in the performance of completed projects to manage, plan, design, and implement successful release of the Secure Text Messaging system service solution that meets the criteria of this procurement. Clearly describe the scope and scale of those projects. Describe why your experience positions you firm as the best candidate for this project. The desired format for the experience matrix is below.

Identify projects by Bidder or subcontractor and describe the nature and extend of the involvement with setup, configuration and activation of mobile devices. Bidder and subcontractor experience must be listed separately.

Include in this section any other experience deemed relevant by the Bidder. While Bidders are required to have completed a minimum of three (3) projects to be qualified to respond, they may describe as many projects as they deem appropriate to adequately convey their experience and qualifications.

Complete the following table for the minimum three (3) projects. Add additional projects if you wish.

Project Name:
Start and End Date:
Customer and Type of Business:
Project Description, Role of Firm, and End Result:
Proposed Team Members Who were Involved in the Project:
List Subcontractors and Describe Their Involvement with the Project:
Project Name:
Start and End Date:
Customer and Type of Business:
Project Description, Role of Firm, and End Result:
Proposed Team Members Who were Involved in the Project:
List Subcontractors and Describe Their Involvement with the Project:
Project Name:
Start and End Date:
Customer and Type of Business:

Project Description, Role of Firm, and End Result:
Proposed Team Members Who were Involved in the Project:
List Subcontractors and Describe Their Involvement with the Project:

Scores for this section will be based upon, but not limited to, the degree to which the Bidder and proposed subcontractors demonstrate direct experience with all aspects of projects of similar scope and complexity and broad expertise with technology. Importance is given to the specific project role the Bidder/subcontractor has performed, as well as the scope and complexity of the projects in which the Bidder/subcontractor has participated. Both depth and breadth of experience is important.

d. Project Account Management

(1) Contractor Project Account Management (SR)

The Contractor's Project Account Manager assigned to the state of Washington account will act as facilitator for engaging all resources within Bidder's organization. The Contractor's Project Account Manager will identify and supply Contractor's resources to ensure all plan tasks assigned to them are completed on time and within project scope in accord with the Project Schedule. The Contractor's Project Account Manager will be the first line of contact for DSHS and will be responsible for escalating issues to the next level of management in the Contractor's organization that cannot be resolved.

The purpose of this section is to provide evidence that the proposed Contractor's Project Account Manager has experience to support a successful implementation.

Bidder is to propose a Project Account Manager for this engagement who has at least three (3) years of experience implementing Secure Text Messaging systems in public sector or health organizations similar to size and complexity to DSHS.

U.S. public sector experience includes but is not limited to state and federal government, city, counties, state universities and colleges, school districts, ports or other municipalities. Health organizations experience includes but is not limited to hospitals, clinics, and other health facilities.

Provide the following information to substantiate your proposed Project Account Manager's experience.

- Name and title;
- Description of education and training;
- Description of previous experience and number of years fulfilling their assigned role; and
- Description of previous direct experience with implementing recruiting hosted provider solutions for public sector or health organizations.

Bidder may include any other experience deemed relevant by the Bidder to adequately convey the individual's experience and qualifications. Responses for this section must not exceed one (1) typed pages.

Scores for the proposed Contractor's Project Account Manager's qualifications will be based on, but not limited to the depth of knowledge, relevance and breadth of experience. Scores for this Scored Requirement will be awarded for experience directly related to the proposed engagement.

(2) Approach to Project Account Management (SR)

The successful Bidder will be responsible for the overall management of the project system implementation. Describe your Project Account management process and the methodology that will be used for this project. Provide sample project reports from previously managed projects and describe how the projects were constructed and reported. Explain how you will interact with DSHS staff and how you generally interact with other contractors or consultants.

Scores for this section will be based upon, but are not limited to, the degree to which the Bidder's overall approach to project management demonstrates their ability to manage the project; construct, provide status, and report on the project; and interact with DSHS and other contractors or consultants.

(3) Project Scheduling Experience (SR)

The successful Bidder will be required to have experience managing system implementation projects using scheduling software. The successful Bidder will be required to create and maintain the project schedule in Microsoft Project, DSHS's standard project scheduling tool. DSHS's rule of thumb related to the level of detail in the schedule is one to two week task duration where practical to enable DSHS staff and the successful Bidder to track and monitor progress. Inclusion of milestones within each of the project phases is important as well.

Describe your plan for accomplishing this scheduling requirement including any previous experience using Microsoft Project. Provide samples of previous system implementation project schedules and describe your skill level. Describe the Basis of Estimate (BOE) including specific estimating guidelines used to determine work effort for project planning purposes. Describe any additional project management tools that may be used during the project.

Scores for this section will be based upon, but are not limited to, the strength the Bidder demonstrates the ability to establish and maintain the project schedule and plan with an appropriate level of schedule detail.

(4) Project Status and Exception Report Requirements (SR)

The successful Bidder will be required to provide written status reports to DSHS Project Manager on a weekly basis throughout the system implementation project as well as an electronic copy of the current project schedule in Microsoft Project format. More frequent verbal or written reports or electronic files may be required as deemed necessary by the DSHS Project Manager or designee. The Bidder will also be required to regularly update the project work plan throughout the project to accurately reflect all elements of the planned activity. The DSHS Project Manager or designee prior to incorporation into the project work plan must agree upon any such changes.

Provide a proposed format for the written weekly status report. Provide examples of any other reports commonly used to report exceptions and/or project status.

Scores for this section will be based upon, but are not limited to, the type of information contained in the weekly report and the source of that information.

(5) Tracking, Issue Resolution, and Change Management (SR)

The successful Bidder, in partnership with DSHS, will be responsible for using an issue resolution process for recording and tracking any system development problems, issues, and changes.

Describe your proposed process for managing issues, problems, and changes. Consider the entire system development cycle. Explain by whom and how issues, problems, and changes should be resolved.

Scores for this section will be based upon, but are not limited to, the degree to which the proposed process provides and describes specific techniques to identify, communicate, and manage issues, problems, and changes.

(6) Preliminary Work Description and Project Schedule (SR)

The Bidder shall develop a preliminary Work Description and Project Schedule that represents the Bidder's proposed approach to this project. The preliminary Work Description (preferably in Microsoft Word format) and Project Schedule (preferably in Microsoft Project format) shall include the proposed deliverables, identify Bidder and DSHS resource requirements, identify where access to system users and DSHS hardware is required, describe deliverables by project phase, and establish mutual expectations in order to complete the project successfully.

Bidders must include, at a minimum, the specified deliverables identified on Exhibit B, Statement of Work. The completion of each project phase will be based upon DSHS's acceptance of all deliverables included in the phase.

Scores for this section will be based upon, but are not limited to, the completeness of the preliminary work description, project schedule, and description of project deliverables, and the degree to which the preliminary work description, project schedule, and description of project deliverables demonstrate the Bidder's understanding of the technical skills and resources required to successfully accomplish the objectives of the project and assure timely completion of deliverables.

4. Cost Proposal (Section 4 of Proposal)

a. Identification of Costs (MR)

In this section of the proposal, the Bidder is to identify all costs including expenses to be charged for performing the tasks necessary to accomplish the objectives of the contract. The Bidder is to submit a fully detailed budget including staff costs and any non-labor expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Bidders are required to collect and pay Washington state sales tax, if applicable.

b. One-Time Price of the Proposed System (SR)

Using the spreadsheet provided in **“Exhibit D, Financial Proposal Spreadsheet,”** Bidder is to itemize all one-time costs associated with the configuration, installation and implementation of the proposed System, including:

- Implementation Services
- Other Professional Services
- Client Access License (Perpetual and/or Subscription)
- Training
- Other one-time costs

Proposed rates are to be inclusive of all expenses, including state and local taxes and travel. Bidders should calculate the sales taxes at 8.8%, where applicable. DSHS will not pay for costs not identified by Bidders in its Financial Proposal.

c. On-Going Price of the Proposed System (SR)

Using the spreadsheet provided in **“Exhibit D, Financial Proposal Spreadsheet,”** Bidder is to itemize all on-going costs associated with the configuration, installation and implementation of the proposed System including:

- Subscription
- Support
- Other on-going maintenance costs

Proposed rates are to be inclusive of all expenses, including state and local taxes and travel. Bidders should calculate the sales taxes at 8.8%, where applicable. DSHS will not pay for costs not identified by Bidders in its Financial Proposal.

d. Change Order Services – Time and Materials Hourly Rate Schedule (SR)

During this project, DSHS or the Bidder may suggest changes that were not possible to identify during the finalization of the Bidder's Work Plan. It is

hoped that the cooperative approach to this project will find ways to effect such changes in a cost-neutral manner. DSHS is hopeful that change orders will not be required. However, any change orders that are required will result in a time and materials, deliverables-based amendment to the agreement. The Bidder shall have the burden of proof in justifying any change orders that it requests. All change orders will be developed using a standard form and process to be agreed to mutually by the Bidder and DSHS.

The Bidder shall provide an Hourly Rate Schedule, specifying cost per hour of staff, on the form at the end of this section. This pricing will be used for ad-hoc requests (i.e., Change Orders, which do not coincide with specific deliverables.) The staff time allowed under Change Orders will be based on hourly rates for staff/services as specified on ***Exhibit D, Financial Proposal Spreadsheet***.

The Hourly rate proposed must remain valid until June 30, 2018. Annual rate increases beyond that date will be subject to negotiation, but the percentage increase may not exceed the percentage increase in the US Consumer Price Index (CPI) for All Items.

Contract modifications addressing implementation of projects using the Hourly Rates Schedule will take the form of Change Orders that define the statement of work, deliverables, and compensation. Each of these Change Orders will be for billable hours with a firm, not to exceed, fixed price.

- e. Limitation on User License Price and Maintenance for Subsequent Years (SR)

Using the spreadsheet provided in ***“Exhibit D, Financial Proposal Spreadsheet,”*** Bidder is to provide a not-to-exceed percentage cap that the Contractor will not exceed when increasing its rates in subsequent years of the Contract.

The total number of available points is 20.

SECTION D. EVALUATION

1. Evaluation Procedure

DSHS shall designate an evaluation team to review, evaluate, and score Bidder Proposals. DSHS, at its sole discretion, will select finalists for an oral presentation, if oral presentations are held. Evaluators will evaluate and score the oral presentations of Bidders selected as finalists.

2. Proposal Evaluation

DSHS will initially screen each Proposal to determine if the Bidder has complied with the stated Administrative Requirements and Submittal Instructions. If a Proposal does not meet all Administrative Requirements for this RFP, DSHS may consider the Proposal non-responsive and may withdraw it from consideration at any time. If a Proposal meets all Administrative Requirements, evaluators will score and award points up to the maximum points available for each question.

3. Points of Clarification

While DSHS reserves the right for its evaluation teams to contact Bidders for clarification, Bidders should not assume that deficient answers will result in clarification requests.

The right of clarification is not a Bidder's right, it is DSHS's right and DSHS expects to be very stringent in the exercise of this right.

4. Scoring of Proposals

The maximum number of evaluation points available is 200. The Administrative Requirements are evaluated on a pass/fail basis. The following weighting and points will be assigned to the Proposal for evaluation purposes:

Oral Presentations will be scored separately with a maximum value of 100 points.

WRITTEN PROPOSAL

Technical Proposal – 60%	60 Points
Experience and Qualifications – 20%	20 Points
Cost Proposal – 20%	20 Points

Sub-Total (for Written Proposal)	100 Points
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Oral Presentations	100 Points
References	Pass/Fail

TOTAL	200 Points
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5. Evaluation Points

The evaluation will be based only upon the response and not upon the evaluator's external experience with, or perception of, the Bidder or upon Bidder presentations made prior to the release of this document.

Each scored item will be awarded points by each evaluator or by the team in total. Points will be assigned based upon the evaluator's interpretation of the effectiveness and efficiency of the Bidder's response to each requirement. In addition to the point score assigned (see listing below) each scored item is assigned a weighting value. The score of the evaluators will be multiplied by the weighting to give the weighted score.

The evaluation teams will score independently of other teams. Upon completion of team scoring, the scores will be given to the Procurement Coordinator. Scoring will be based upon a scale of zero (0) to four (4), with those scores being defined as follows:

Score	Description	Discussion
4	Exceptional	Feature or capability is clearly superior to that which is average.
3	Above Average	Feature or capability is better than that which is average.
2	Average	This is the baseline score for each item with adjustments based upon the evaluator's interpretation of the Bidder's response.
1	Below Average	Feature or capability is substandard to that which is average.
0	Failing	Feature or capability is non-responsive or clearly inadequate to that which is average. For a mandatory requirement, it will result in disqualification of the Bidder's response.

For Cost Proposal, the evaluation team will evaluate the Bidder's response and related supporting documentation. A portion of the final score for the Cost proposal evaluation will be computed by dividing the lowest response net financial cost by the Bidder's net financial cost. The result of these calculations will be multiplied by the overall financial points available. See the example below:

Example: A total point for the section = 20
Lowest bid = \$20,000
Bidder's bid = \$25,000

$\$20,000$ divided by $\$25,000$ = 0.80 (80%)

0.80 times 20 points possible = 16 points for the Cost Proposal

6. Preliminary Weighted Score

The preliminary weighted score shall be computed by the Procurement Coordinator and shall be the sum of the Functional/Technical, Management, Experience and Qualification, and Financial/Cost scores. The preliminary weighted score will be used to identify finalist Bidders.

7. Evaluation of Oral Presentations

DSHS may, after evaluating the written Proposals, elect to schedule oral presentations. The RFP Coordinator will notify the top three finalists of the date, time, and location of the oral presentations.

DSHS will select evaluators for the oral presentations based on their qualifications, experience, and background relevant to this RFP. These evaluators may include evaluators who reviewed the written Proposals or DSHS staff who will work with the successful Bidder(s). Evaluators will score the oral presentations in accordance with RFP requirements and evaluation criteria.

8. Final Determination of Apparently Successful Bidder(s)

DSHS program staff and/or management may conduct a final review of the evaluation and scoring of finalist(s).

In this final review, DSHS may consider past or current performance of any DSHS contracts by a finalist(s), and any experience of the program or DSHS in working with a finalist(s) under any past or current contract with DSHS.

DSHS management shall make the final determination as to which Bidder(s), initially designated as finalist(s), shall be officially selected and notified as the Apparently Successful Bidder(s).

Program staff and DSHS management shall determine which Proposals reviewed during this final selection process will best meet the needs of DSHS.

Any Bidder who would be an Apparently Successful Bidder based on the scores awarded by the evaluators, and who is not selected, shall be provided, upon request, the reasons why DSHS selected a Bidder with a lower final score.

Secure Text Messaging – Sample Statement of Work Contract Exhibit B

Statement of Work

The Contractor shall provide the services, staff, and tools to successfully implement and maintain a secure, robust, interactive, reliable, high-speed text messaging solution to be used to protect the Department of Social and Health Services (DSHS) communication, data and applications stored in or being transmitted through mobile devices. The service will be an integral part of the internal communication processes at DSHS. The service must be available to initiate and deliver messages 24 hours a day, seven days a week, and 365 days a year. The service must also provide the ability to retain (store), search, and produce (for public records requests, litigation discovery, employee investigations, audits, and/or other business purposes) data residing or transmitted through mobile devices. The Contractor shall do all things necessary for or incidental to the performance of work, as set forth below.

1. **Scope of Work** – Included in the Scope of this Contract are the following deliverables.
 - a. **Service Deliverable – Implementation Plan** – Contractor will work closely with the DSHS project team to develop a detailed Implementation Plan for implementing a Secure Text Messaging solution in DSHS. Contractor shall complete the Implementation Plan within two weeks after execution of this Contract. Upon DSHS approval of the Implementation Plan, the Implementation Plan will become an Exhibit to this Contract. The Implementation Plan shall include, at minimum:
 - i. **Infrastructure Plan** – Description of the hardware and software components supporting the Secure Text Messaging service solution for DSHS.
 - ii. **Data Integration/Coexistence** – Description of technical processes required to integrate/coexist with the Secure Text Messaging service solution, for example, Microsoft Active Directory, Mobile Device Management, mobile device system integration, on-call or scheduling software, other 3rd party systems, or other departmental systems.
 - iii. **Service Authentication** – Description of technical processes, required for the configuration of authentication processes or Single Sign-On through Microsoft Active Directory.
 - iv. **Design and Configuration Plan** – Description of the Secure Text Messaging service solution configuration for DSHS’s environment.
 - v. **Test Plan** – Description of the unit, function, integration, performance and final acceptance tests, responsibilities, and thresholds for verifying and validating that the delivered service meets the specifications in the design and

configuration plan above, and satisfactorily meets DSHS requirements, including process to identify service defects or bugs.

- vi. **Security Plan** – Description of the security processes and policies required to safeguard the service, data and users during and after implementation conforming to DSHS network security policies as stated on RFP #1556-535 and Response.
- vii. **Backup and Recovery Design** – Description of backup and recovery design for the DSHS Secure Text Messaging service solution and related components.
- viii. **Service Support Plan** – Description of service support and hours of service support.
- ix. **Training Plan** – Description of the content, participants, format, and timing of all required training for DSHS service administrators and end users.
- x. **Approach** – Description of Contractor’s approach for managing the implementation of the Secure Text Messaging service solution, including tactical implementation and rollout approach.
- xi. **Implementation Schedule** – The tasks, deliverable, dates, required resource assignments, and critical path to complete the implementation. Contractor shall complete the Implementation Schedule within two weeks after execution of this Contract. Upon DSHS approval of the Implementation Schedule, the Implementation Schedule will become an Exhibit to the Contract.

b. **Service Deliverable 2 – Service Setup and Configuration** – Secure Text Messaging Service setup and configuration for DSHS according to the Contractor's Implementation Plan and Implementation Schedule.

- i. **System and Software** – The establishment and initial configuration of the System for the DSHS environment including, but not limited to:
 - 1. **System Configuration** – The execution of required changes to the Secure Text Messaging solution, including setup, configuration and initialization of any required security, integration of data processes and service authentication for successful access and operation of the service.
 - 2. **Unit Testing** – The testing of individual software components (for example, configuration).
 - 3. **Final Acceptance Testing** – Testing of the Secure Text Messaging Service in production following final user training according to the Contractor's Implementation Plan and Implementation Schedule.
- ii. **Service Demonstration** –The Secure Text Messaging service solution must demonstrate that it can:
 - 1. Meet all of the Mandatory requirements identified in RFP #1556-535 and any subsequent agreement.
 - 2. Meet all non-mandatory requirements as indicated by the bidder in response to RFP #1556-535 and any subsequent agreement.

- c. **Service Deliverable 3 – Training** – Contractor shall provide the required training to DSHS selected staff according to the Contractor's Implementation Plan and Implementation Schedule.
- d. **Service Deliverable 4 – Training Material** – Contractor shall provide at a minimum, all training material as indicated by the bidder in response to RFP #1556-535 and any subsequent agreement. DSHS shall be able to modify training material provided by the Contractor to meet DSHS needs.
- e. **Service Deliverable 5 – Transition Plan and Support and Maintenance Plans**
 - i. **Transition Plan** – Description of the process for cutover from the current to new production environment.
 - ii. **Support and Maintenance Plan** – Description of the post-production roles and responsibilities for maintaining the Secure Text Messaging service operational.
- f. **Service Deliverable 6 – Plan for Ongoing Consulting and Implementation Services** – Description of the processes for ongoing consulting and implementation/configuration service through the life of the Contract.
- g. **Service Deliverable 7 – Knowledge Transfer** – While constructing and developing Deliverables, including without limitation for Hosted Services, Contractor shall document, demonstrate and provide information to staff designated by DSHS about the functions and operations of all such software in accordance with the Specification and the Contractor's Implementation Plan.

Deliverables outlines in this Statement of Work may change as a result of the ASB proposal and the Contractor's Implementation Plan. Upon execution of the Contract, changes shall be mutually agreed upon and documented by using a numbered Change Order. Change Orders must be approved and signed by the Contractor Executive Manager and the DSHS Deputy CIO.

Period of Performance

The Contract Period of Performance is **May 1, 2015**, or upon the start date of Contract execution date, whichever is later, through **June 30, 2016**.

Place of Performance

The Place of Performance will be as indicated by the bidder in response to RFP #1556-535 and any subsequent agreement.

DSHS will provide a reasonable work place environment in the Olympia vicinity for Contractor's personnel on assignment to the Contract. This facility will include office space and individual workstation furniture, telephones, and access to copy and facsimile machines.

The Contractor must provide personal computers, computer workstations, and software to be used by the Contractor. DSHS will provide local area network access and e-mail.

Any resources provided by DSHS for the Contractor's convenience shall be and shall remain the property of DSHS. Contractor's personnel will use the telephone and other equipment in accordance with

procedures established for DSHS personnel. Access to the State's SCAN network for long distance calls can be provided.

The Contractor will be required in the Contract to use the facilities, resources, and equipment for authorized Contract related activities, to comply with DSHS standards and practices pertaining to physical security and access control, and to comply with data security and integrity standards. Contractor will be required to reimburse DSHS for photocopy and telephone expenses.

The Contractor will be required to pay for parking.