



Washington State  
Department of Social  
& Health Services

*Transforming lives*

## REQUEST FOR PROPOSALS

No. 2323-833

ORIA Case Management and  
Database Solution

**DSHS Administration:**  
**ESA-CSD**

### Solicitation Schedule

Event	Date and Time
DSHS posts Competitive Solicitation.	<b>1/10/2024</b>
Pre-Bid Conference at 3 p.m. Pacific Time. Link	<b>1/18/2024</b>
Bidder questions are due by 3 p.m. Pacific Time.	<b>1/19/2024</b>
Proposals are due by 3 p.m. Pacific Time.	<b>2/9/2024</b>
Anticipated Contract Executed start date.	<b>4/12/2024 - 4/26/2024</b>
<b>Estimated Contract Performance Period</b>	<b>One (1) year</b>

**Responses must be submitted to** Nicole Kahle, Coordinator Department of Social and Health Services; Facilities, Finance and Analytics Administration; Central Contracts and Legal Services  
Email: [Nicole.kahle@dshs.wa.gov](mailto:Nicole.kahle@dshs.wa.gov)

#### **Solicitation and Amendments will be posted on:**

DSHS Procurement Website: <https://www.dshs.wa.gov/ffa/procurements-and-contracting>

WEBS Website: <https://pr-webs-vendor.des.wa.gov/>

Applicable WEBS Commodity Codes: 952-43, 920-03, 920-14, 208- 32, 208-36, 208-37, 208- 53, 208- 80, 209-13, 209-38

#### **Auxiliary Aids and Limited English Proficient (LEP) Services:**

DSHS will provide access to this Solicitation document to individuals with disabilities and Limited English Proficient individuals. Please contact the Coordinator to request auxiliary aids and services.

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## SECTION A CONTRACT REQUIREMENTS

### 1. Purpose

This competitive Solicitation is issued to assist the Office of Refugee and Immigrant Assistance (ORIA) in seeking a qualified Contractor for a flexible, scalable, configurable, cost-effective Case Management and Database software solution system that adjusts to rapidly changing programs, policies and state/federal reporting requirements. The case management solution will allow ORIA's contracted service providers to capture individual client and service information related to various programs and to generate applicable program reports to support invoicing and for state and federal reporting. It will increase the efficiency and accuracy of data management and program evaluation, allowing ORIA to focus on providing high quality services for refugee and immigrant families and individuals in Washington State.

### 2. Background

ORIA is an office located within the State of Washington, Department of Social and Health Services (DSHS), Economic Services Administration, Community Services Division. ORIA's goal is for refugee and immigrant families and individuals to succeed and thrive in Washington State. The office is responsible for meeting federal and state reporting requirements needed to secure and retain funding. This includes capturing client information, program outcomes, supporting community-based partners and measuring client success. ORIA partners with a network of contracted service providers statewide that provide culturally responsive and linguistically appropriate services to achieve goals. Individuals with an immigration status who are eligible for services funded by ORIA are referred to and/or enroll in services provided by these contracted service providers.

ORIA currently has 21 programs that provide a continuum of services to support eligible clients from the time they arrive in Washington State until naturalization (usually after five years in the US). Numbers served can vary dramatically from one year to the next, but since 2022, roughly 20,000 clients annually receive services through 100 contracted service providers. Data is collected and stored covering clients over several different service program areas. In the future, additional programs and contracts may be initiated as needs arise. Individual programs may also have multiple funding streams with distinct eligibility requirements. Current programs focus on the following areas:

- **Basic Needs Assistance Programs:**
  - Refugee Cash Assistance (RCA).
  - Refugee Medical Assistance (RMA).
- **Employment and Training Services Programs:**
  - Limited English Proficiency (LEP) Pathway—Employment.
  - Limited English Proficiency (LEP) Pathway—Education.
  - ORIA Basic Food, Employment and Training (ORIA BFET).
  - Food Assistance Program (FAP) Employment and Training.
  - Career Ladder for Educated and/or Vocationally Experienced Refugees (CLEVER).

- **Immigration and Naturalization Assistance Programs:**
  - Naturalization Services.
  - Immigration-related Legal Services for Refugees.
  - Immigration-related Legal Services for Ukrainians.
  - Immigration-related Legal Services for Afghans.
- **Whole Family Services Programs:**
  - Promoting Refugee Integration Mobility and Empowerment (PRIME).
  - Housing Stabilization Services.
  - Refugee School Impact.
  - Early Refugee School Impact
  - Refugee Youth Mentoring.
  - Unaccompanied Refugee Minors.
  - Services for Older Refugees.
  - Community Outreach, Orientation and Education.
- **Refugee Health and Wellness Programs:**
  - Mental Health Services.
  - Refugee Health Screening.
  - Refugee Health Promotion.

As the contracted service providers accept walk-ins and referrals, enroll individuals, determine needs and provide services, which may include providing direct financial support, those interactions are currently recorded in Excel worksheets for most programs. ORIA also uses Washington State's WorkFirst case management system, the electronic JOBS automated system (eJAS), for the LEP Pathway Employment, ESL and the Naturalization programs, and a SQL based system for the PRIME case management system. This siloed approach creates a challenge, because individuals are often participating in multiple overlapping programs. ORIA has no comprehensive case management and database system available for tracking enrollment and services across programs, providers or service years.

ORIA is seeking a comprehensive, flexible, and efficient case management and database system that breaks down silos, incorporates all programs and allows coordination around clients participating in multiple programs. The goal for this new, comprehensive Solution is to increase the efficiency and accuracy of managing caseload data by allowing contracted service providers and ORIA staff to submit and review data online across ORIA's various and diverse programs, as well as to generate reports for program evaluation, strategic planning, invoicing and required state and federal reporting. ORIA staff and contracted service providers will be better able to focus on delivering the services on which refugee and immigrant families and individuals in Washington state rely with a comprehensive case management system that tracks and reports on program, household and individual details, such as:

- Individual and household service levels, including tracking direct funds provided for rent, legal assistance, etc.
- Self-sufficiency, budget and other individualized plans.
- Program performance measurements.
- Service levels across multiple ORIA programs.

ORIA desires a Solution that allows for program configuration of simple functionality, such as new data fields and value lists. A configurable Solution would allow ORIA to nimbly grow or modify the tool as programs change to fit the needs of Washington refugees and immigrants in the future. Finally, ORIA is looking for the most cost-effective technology Solution that meets business needs without compromising usability, security, scalability and stability.

### **Case Management and Database Solution Business Needs**

ORIA's programs and services use a variety of tools to manage cases, meet goals and objectives, including the eJAS system, SQL based system and Excel spreadsheets. The purpose of this RFP is to solicit qualified Bidders to provide a customizable and future-forward configurable Case Management and Database Solution that meets the business needs below. These needs outline the essential functionality necessary to meet program service goals. The Project Scope (section 4) outlines desired additions ORIA is looking for to enhance the functionality of their case management and database solution.

### **Contractual Requirements**

- The Bidder and the Solution shall meet all elements of Attachment A, the sample contract.

### **General Business Needs**

- The Bidder provides a platform using the Solution's interface for all existing ORIA programs.
- The Solution's access is via a web portal for contracted service providers and other users. It provides interface/online access to Solution users.
- All necessary fields needed for case management are available for web portal data entry.
- It has the capability to be configured and customized in the future to include modifications to programs or additional programs/services as needs arise.
- The Solution includes dashboards, which vary between ORIA and contracted service providers based on registered profiles.
- It has the ability to search or lookup information efficiently with basic search capabilities based on various key words and data previously entered.
- Plans, documentation of goals and services can be transferred to and from the Solution users and clients in electronic and printed form.
- It allows multiple users to concurrently access and use the Solution (data entry, uploads, etc.).
- The Solution includes electronic workflows and tracks approvals needed for each workflow.
- The Solution links individuals within a family or household. Individuals within the household have unique identifiers and are linked to a household identifier.
- The Solution provides ORIA staff the ability to perform basic database formatting to reflect new or changing data element requirements, such as to add, update or delete new data fields, drop down lists, and other.

### **Data Management Business Needs**

- The Solution allows contracted service providers to enter client and service information, complete forms, upload documents, and view caseloads and case management data.
- The Solution tracks any data entered or modified into the web portal.

- The Solution has the ability to enter comments and case notes as needed that can be accessed, displayed and tracked historically.
- It provides the ability to save work in progress and continue it at a later date and time.
- The Solution allows users to make edits and modifications to data to minimize or fix errors and duplications.
- The Solution captures and tracks general intake and assessment information, client service activity from intake to completion, such as family self-sufficiency plans and budget plans, and tracks historical changes and progress made for client and household.
- The Solution allow for reviews, updates and tracking for each client including service history data across multiple programs and providers.
- The Solution provides the ability to manage client contact information.
- Through the Solution, users have the ability to document, modify and track the unique contractual requirements within each ORIA program.
- The Solution includes the ability to input specific ORIA Program client information, such as on verifying and documenting the client's eligibility determination.
- The Solution restricts the creation of duplicate records for the same client individual and/or household and allow for correcting/merging duplicative records, if needed.
- It collects and maintains case comments and tracks referrals related to all providers and services inside and outside of ORIA.
- The Solution captures a contracted service provider's caseload and service history across all its contracted ORIA programs.
- The Solution collects and securely maintains data, including client private data and personal identifying information, within a database.
- ORIA level users are able to process data or pull a report for reporting purposes as they arise.
- The Solution incorporates all existing Excel migrated in, as selected by ORIA.
- It allows import and export of data in various formats.
- Contracted service providers have the ongoing option to upload an Excel file with required data, populating existing database fields.
- The Solution captures and retains all ORIA programs' detailed data according to the retention period per DSHS retention policies. It will capture and retain historical high-level data, including demographics of enrollment in ORIA specific programs in perpetuity without any person identifying data.

### **Reporting Business Needs**

- The Solution gathers and aggregates data to generate federal, state and program-level reports for any given timeframe. It generates standardized reports, such as performance outcome reports for contracted service providers, ORIA programs reviews and evaluations.
- It has the ability to generate reports regularly and create custom reports, such as on client outcomes and contracted service provider performance. It allows ad-hoc reports/queries to be saved for running future reports.
- The Solution has programmatic reporting forms, such as intake and assessment forms, and the ability to modify and create new forms as needed.
- It generates reports with client and service information that contracted service providers can use when they submit invoices outside the system for payment.

- It allows all reports to be exported to Excel and to be printed both on an ad-hoc, on-demand basis and according to a schedule.
- Users, including non-database experts, are able to look at the identified detailed records included in reports, correct data, if needed and rerun the aggregated totals (based on user permissions).

### **Security Business Needs**

- ORIA is able to limit the number of users per provider in the Solution. The Solution has user administration, role-based security and auditing (entry, update, view, print, delete) capabilities.
- It provides a unique login for each user and will use role-based security with various levels of permission.
- The Solution provides ORIA the ability to approve and rescind user access, as needed.
- The Solution provides a last-used date for each user, including contracted service providers.
- The Solution allows the ability to assign permissions to users' access levels based on need.
- The Solution provides ORIA an active directory on all users, including name, title, agency affiliate, contact information, and access start/end dates.
- The Solution tracks system access by user and creates an audit trail. It tracks user login date and time, as well as data accessed, added, modified, and/or deleted.
- The Solution allows private note availability.
- The Bidder is responsible for supporting ORIA during disaster recovery and disaster recovery exercises including recovering the Solution according to DSHS Recovery Time Objective and Recovery Point Objective requirements.
- The Bidder will propose a service level agreement for the Solution, subject to ORIA's approval.
- The Bidder provides information on their Solution, including how new versions are released, bugs fixed, and updates applied and a framework for planned and unplanned outages and disaster recovery.

### **Business Needs for Bidder Services**

- The successful Bidder fully collaborates with ORIA to customize and/or configure the Solution to meet the needs of ORIA's programmatic needs.
- The Bidder creates Business Requirement Document, subject to ORIA approval, that describes in detail all of the processes that will be implemented and the detailed requirements and the acceptance process.
- Bidder identifies key personnel it shall utilize in performing this Contract, and their experience and qualifications, as part of its Response. If awarded a Contract, no changes are made to such Key Personnel during the term of the Contract except as requested or approved by DSHS.
- Bidder provides clear and comprehensive training and written instructions, tools and documentation to enable ORIA staff and end-users to successfully and independently operate the Solution without needing to bring in additional Contractor support, including training new users.

## **3. Project Scope**

The purpose of this RFP is to solicit qualified Bidders to provide a customizable Case Management and Database Solution that at a minimum meets the business needs set forth above as well as some or all of the desired additional functionality set forth below.

#### **DESIRED SCOPE ENHANCEMENTS:**

The ideal Solution would:

- Have the ability to require mandatory documents needing to be attached with a new form.
- Use e-signatures for online forms, with the ability to sign manually when needed.
- Include help text as needed, such as definitions to fields that might be confusing.
- Have the ability to pivot between the individual and family level for all people connected through the Solution in the same household.
- Provide the ability to analyze data for performance measurement, assessments and evaluations. The ideal Solution would have the capabilities to perform analysis, calculations and aggregate data computations across single or multiple programs for evaluation.
- Allow contracted service providers working with the same client to communicate and view services for better coordination and to prevent duplication of services, excluding protected information.
- Track service levels and funding associated with them, such as if a client gets direct support service funds, such as funding for rent or legal services.
- Include required fields, as determined by ORIA, that must be filled in and error free before users can proceed.
- Generate error reports on data entered incorrectly.
- Allow the contracted service provider to make modifications to specified data when an application/form, support service budget or invoice submitted outside the system is returned.
- Indicate which sections/fields have been modified when data entered through the web portal has been changed.
- Establish a protocol for locking accounts after a certain number of failed attempts and allow for ORIA administrative unlocking. It would also ensure access is granted to only humans, not a bot through a system check at log-in.
- Include a separate government data storage section.
- Provide business intelligence functionality within the Solution.
- Provide the ability to flag when contracted service provider information is determined to be in non-compliance for correction.
- Align with existing DSHS systems to achieve compatibility and shared functionality, promoting linkage and preventing data duplication when feasible. It would have the ability to interface with DSHS systems and applications, if needed.
- Provide the ability to integrate with contracted service providers systems and with other data systems.
- Create a mobile-friendly application that can be run efficiently on any device.
- Allow for more than 2500 users to concurrently use the Solution.
- Provide baseline functionality as soon as feasible, ramping up to full implementation by the end of Year 1 of the contract through an iterative approach, using a Bidder provided and ORIA approved agile schedule, such as:
  - a. Customizing solution back end to match existing data.
  - b. Customizing solution front end to match existing data.
  - c. Migrating existing data program by program.



- d. Programs start entering in new data into the solution once their old data has been migrated.
- e. Search functionality.
- f. Reporting.
- g. Dashboards.
- h. Workflows.

#### **4. Bidder Minimum Qualifications**

All Bidders must meet the following minimum qualifications:

- a) Experience Requirements:  
The Bidder must have had a contract with an agency or organization for the implementation of a Case Management (CM) and database solution within the last five (5) years.
- b) The Bidder must have at least five (5) years' experience managing projects of similar size and scope.
- c) License Requirement: The Bidder must be licensed or obtain a license to do business in the State of Washington prior to contract execution.
- d) Service Location Requirements:  
The Bidder will provide statewide services in Washington. All services and all data shall remain solely within the continental United States with no services, offshore data warehousing or access allowed.

Bidders failing to demonstrate in their Bids that they meet these minimum qualifications will be considered non-responsive and will therefore be disqualified from further consideration.

#### **5. Period of Contract Performance**

DSHS intends to award one Contract for the Services described in this Competitive Solicitation.

The Contract is anticipated to commence on or around April 4, 2024, through April 4, 2025, for Solution implementation. If Solution implementation cannot be completed within this time, the Contract may be extended or amended for another one (1) year at the sole discretion of DSHS. Additional services that are appropriate to the scope of this Solicitation, as determined by DSHS, may be added to the Contract in a mutually agreeable amendment.

#### **6. Funding**

DSHS has federal funding to allocate in an amount of approximately \$750,000 for success Solution implementation, launch and usage. This includes all costs and taxes for the software, user licensing, hosting, interface, training and Solution support, data conversion and support and maintenance services outlined for this Project. DSHS may reject any Response in excess of that amount. Any Contract awarded is contingent upon the availability of funding.

## SECTION B DEFINITIONS

Additional definitions for Contract-specific terms are found in the Sample Contract set forth as Attachment A to this Solicitation and shall apply to those terms as they are used in this Solicitation. The following terms have the meanings set forth below:

Agency or DSHS – The Washington State Department of Social and Health Services.

Amendment – A unilateral change to the Solicitation that is issued by DSHS at its sole discretion and posted on WEBS.

Apparent Successful Bidder (ASB) – A Bidder submitting a Response to this Solicitation that is evaluated, identified, and announced by DSHS as providing the best value to the Agency. Upon execution of a Contract, the ASB is referred to as the successful bidder or the Contractor.

Authorized Representative – An individual designated by the Bidder to act on its behalf who has the authority to legally bind the Bidder concerning the terms and conditions outlined in this Solicitation and related documents.

Bid - An offer, proposal or quote for goods or services and all related materials prepared and submitted by a Bidder in response to this Solicitation. The terms Bid, Quotation, Response and Proposal are all intended to mean the same thing.

Bidder – An individual, organization, public or private Agency or other entity submitting a bid, quotation, response or proposal in response to this Solicitation.

Category 4 Data – This data is confidential information that requires special handling per statutes and regulations, such as by HIPAA. It requires strict protection from disclosure.

Contract – A written agreement entered into between a successful Bidder and DSHS as a result of this Solicitation.

Complaint – A process that may be followed by a Bidder prior to the deadline for bid submission to alert DSHS of certain types of asserted deficiencies in the Solicitation.

Coordinator or Solicitation Coordinator – An individual or designee who is employed by DSHS within the DSHS Central Contracts and Legal Services Office and who is responsible for conducting this Solicitation.

Debriefing – A short meeting a Bidder may request with the Coordinator following the announcement of the Apparent Successful Bidder for the purpose of receiving information regarding the review and evaluation of that Bidder's Response.

ORIA – The Office of Refugee and Immigrant Assistance under the DSHS, Economic Services Administration, Community Services Division.

Procurement - The broad process of identifying goods and services for purchase or acquisition, of effecting the purchase or acquisition, and of managing the purchase or acquisition. This Solicitation is a part of an overall Procurement process. Despite the

broader meaning attributed to “procurement”, for purposes of this Solicitation, the terms Solicitation, RFP/RFQ/RFQQ and Procurement are interchangeable.

Project - The undertaking or work for which contracted Services are being requested pursuant to this Solicitation.

Protest – A process that may be followed by a Bidder after the announcement of the apparent Successful Bidder to alert DSHS to certain types of alleged errors in the evaluation of the Solicitation.

RCW – The Revised Code of Washington. All references to RCW chapters or sections shall include any successor, amended, or replacement statute.

Responsible Bidder – An individual, organization, public or private Agency, or other entity that has demonstrated the capability to meet all the requirements of the Solicitation and to meet the elements of responsibility. (See [RCW 39.26.160 \(2\)](#))

Responsive Bidder – An individual, organization, public or private Agency, or other entity who has submitted a Bid that fully conforms in all material respects to the Solicitation and all its requirements, in both form and substance.

RFP/RFQ/RFQQ – The request for proposals, qualifications, quotations, or qualifications and quotations set forth in this Solicitation document.

Scope of Work – The Project or work scope set forth in this Solicitation Document that identifies DSHS’ contractual needs and requirements.

Services – Labor, work, analysis, or similar activities provided by a contractor to accomplish a specific scope of work.

Small Business – An in-state business, including a sole proprietorship, corporation, partnership, or other legal entity, that certifies under penalty of perjury that they are Washington Small Business as defined in [RCW 39.26.010\(22\)](#).

Solicitation or Competitive Solicitation – A formal process providing an equal and open opportunity for bidders culminating in a selection based upon predetermined criteria. A Competitive Solicitation requests the submission of bids, quotations, or proposals for the consideration of DSHS in contracting to meet its needs. This RFP/RFQ/RFQQ is a Solicitation.

Solicitation Document – This RFP/RFQ/RFQQ document, including all attachments and all amendments that are issued by the Coordinator.

Statement of Work – The detailed description of services to be performed by the Contractor and outlined in the Contract.

Subcontractor – An individual or other entity contracted by Bidder to perform part of the services or to provide goods under the Contract resulting from this Solicitation. Subcontractors, if allowed, are subject to the advance approval of DSHS.

Veteran-owned business – A business that is certified by the Department of Veterans Affairs (DVA) in the state of Washington. (See [RCW 43.60A.200](#))

WEBS – Washington’s Electronic Business Solution, the Bidder notification system found at <https://pr-webs-vendor.des.wa.gov/> and maintained by the Washington State Department of Enterprise Services.

**SECTION C**  
**EXPLANATION OF SOLICITATION PROCESS**

**1. Solicitation Schedule**

The Solicitation Schedule set forth below outlines the tentative schedule for important events relating to this Solicitation. Except as modified in an Amendment issued by the Coordinator, the dates and times listed through the Response Submission date are mandatory deadlines. The remaining dates are estimates and may change without the posting of an Amendment. Failure to meet the Response deadline will result in Bidder’s disqualification.

Item	Action	Date
1.	DSHS posts Competitive Solicitation.	1/10/2024
2.	Prospective Bidders should register as a Vendor on WEBS using one of the commodities codes on the cover page of this Solicitation as soon as possible to receive notifications.	As soon as possible
3.	Mandatory Bidders must RSVP for the Pre-Bid Conference by 3:00 p.m. Pacific Time.	1/17/2024
4.	Mandatory Pre-Bid Conference at 3:00 p.m. Pacific Time.	1/18/2024
5.	Bidders may submit written questions or requests for change in Solicitation Requirements until 3:00 p.m. Pacific Time.	1/19/2024
6.	DSHS posts responses to written questions.	1/23/2024
7.	Bidders may submit written Complaints by 5:00 p.m. Pacific Time.	2/1/2024
8.	Bidders must submit a Response by 3:00 p.m. Pacific Time.	2/9/2024
9.	DSHS evaluates Written Responses.	2/13/2024 through 2/27/2024
10.	Oral presentations, if requested by DSHS.	3/5/2024 through 3/15/2024
11.	DSHS announces the Apparent Successful Bidder(s) on WEBS and begins contract negotiations.	3/19/2024
12.	DSHS notifies unsuccessful Bidder(s).	3/19/2024
13.	Bidders may request a Debriefing conference until 3:00 p.m. Pacific Time.	3/22/2024
14.	DSHS holds Debriefing conferences, if requested.	3/25/2024

Item	Action	Date
15.	Deadline for submission of Protests by Bidders who participated in a debriefing conference.	4/1/2024
16.	DSHS considers Protests, if any, and issues determination.	4/15/2024
17.	Contract Execution/Start Date.	4/16/2024

## 2. Posting of Solicitation Documents

DSHS shall post this Solicitation, and all amendments and announcements relating to this Solicitation, on WEBS. WEBS can be accessed at: <https://pr-webs-vendor.des.wa.gov/>. In order to inform the largest number of potential bidders about this opportunity, DSHS shall also post documents relating to this Solicitation on the Procurements page of the DSHS website, found at: <https://www.dshs.wa.gov/ffa/procurements-and-contracting>

All Bidders must register as a vendor on WEBS, using an appropriate commodities code listed on the front page of this Solicitation, and download this Solicitation from WEBS. This should be done as soon as possible in order for Bidder to receive notifications automatically generated on WEBS, but no later than the date set forth in Section C.1., Solicitation Schedule for Announcement of the Apparent Successful Bidder(s).

## 3. Amendment, Cancellation/Rejection of Bids, Reissuance of Solicitation

DSHS may amend or add to, retract from or cancel this Solicitation at any time, in whole or in part, and without penalty. DSHS may reject all bids and cancel or reissue this Solicitation. All amendments and notifications of cancellation shall be posted on WEBS. In the event of a conflict between amendments or between an amendment and this Solicitation Document, the document issued latest shall control.

## 4. Communications regarding Solicitation

Upon the posting of this Solicitation, all communications concerning this Solicitation must be directed to the Coordinator listed on the cover page of this Solicitation document. With the exception of the Response, which shall be submitted as provided in Section D, Instructions Regarding Content, Format and Submission of Written Responses, communications with the Coordinator should be sent via email. DSHS may disqualify any Bidder who communicates with anyone in DSHS other than the Coordinator regarding this Solicitation.

DSHS considers all oral communications unofficial and non-binding on DSHS. Bidders should rely only on written statements issued by the Coordinator. Email shall be considered an official method of communication unless otherwise specified in this document.

## 5. Mandatory Pre-Bid Conference

Bidders are **required** to attend an online Pre-Bid Conference, which shall be held via Zoom at the date and time set forth below. The Pre-Bid Conference is an opportunity for

Bidders to learn more about the conditions under which a Contract will be performed.,. At the mandatory Pre-Bid Conference, Bidders will have an opportunity to ask questions and to hear presentations from knowledgeable DSHS personnel. If changes are required as a result of the conference, written amendments will be posted on WEBS.

Date: Thursday, January 18, 2024

Time: 3:00pm to 4:00pm

## Join Zoom Meeting

One tap mobile: US: [+12532158782](tel:+12532158782) or [+12532050468](tel:+12532050468)

Meeting URL: <https://dshs-wa.zoom.us/j/81343817323?pwd=SlhGUzVCskw4MTc0TWtJUWFNaWp5QT09>  
Meeting ID: 813 4381 7323  
Passcode: 032125

## **Join by Telephone**

For higher quality, dial a number based on your current location.

Dial: +1 253 215 8782 US (Tacoma)  
+1 253 205 0468 US  
+1 669 444 9171 US  
+1 669 900 6833 US (San Jose)  
+1 719 359 4580 US  
+1 346 248 7799 US (Houston)  
+1 305 224 1968 US  
+1 309 205 3325 US  
+1 312 626 6799 US (Chicago)  
+1 360 209 5623 US  
+1 386 347 5053 US  
+1 507 473 4847 US  
+1 564 217 2000 US  
+1 646 931 3860 US  
+1 689 278 1000 US  
+1 929 205 6099 US (New York)  
+1 301 715 8592 US (Washington DC)

Meeting ID: 813 4381 7323

Passcode: 032125

International numbers

## **6. Questions and Answers**

Bidders may send written questions concerning this Solicitation to the Coordinator by the date and time set forth on the Solicitation Schedule in Section C.1. for submission of Questions. Questions should be sent via email and should include the number and title of this Solicitation in the subject line.

DSHS may consolidate Bidder questions and shall respond by posting one or more Amendments on WEBS and on the DSHS Procurement website on or around the date specified in the Solicitation Schedule. Only Bidders who have properly registered and downloaded the original Solicitation directly via the WEBS system: <https://pr-webs-vendor.des.wa.gov/> will receive notification of Amendments and other correspondence pertaining to this Solicitation.

## **7. Request for Change in Solicitation Requirements**

If Bidder believes that this Solicitation contains requirements which would unreasonably prohibit or restrict Bidder's participation or believes that different requirements would provide better value to the State, Bidder shall submit a written explanation of the issue together with proposed alternative requirements to the Coordinator no later than the deadline for Bidder Questions as stated in the Solicitation Schedule outlined in Section C.1. The Coordinator shall not be required to consider requests for changes after this date. If any changes are made to the Solicitation requirements, an Amendment setting forth those changes will be posted on WEBS.

## **8. Complaints**

In the event a Bidder believes that this Solicitation either: (a) unnecessarily restricts competition; (b) contains an unfair or flawed evaluation or scoring process; or (c) contains inadequate or insufficient information to permit preparation of a Response, the Bidder shall submit a written complaint to the Coordinator. The Coordinator will forward the complaint to the DSHS Chief of Central Contracts and Legal Services for review. The complaint shall include a proposed remedy and shall be submitted no later than five (5) business days prior to the date when Responses are due. DSHS shall post its Response to the Complaint on WEBS and on the DSHS procurement web page.

Should a Bidder's complaint identify a change that would be in the best interest of DSHS to make, DSHS may issue an Amendment modifying this Solicitation. The DSHS decision regarding a complaint is final and no further administrative appeal is available. If no complaint is filed, a Bidder cannot later file a protest based on any of the above complaint criteria.

## **9. 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, 39.26.240 and 39.26.245, the State of Washington encourages participation by Veteran-owned, Minority-Owned, and Women-Owned businesses either self-identified or certified by, respectively, the Department of Veterans Affairs or the Office of Minority and Women's Business Enterprises (OMWBE). While the State does not give gender or race-based preferential treatment, it does seek equitable representation from Washington Small Businesses as well as the veteran, minority, and women-owned business

communities.

According to Chapter 39.26.010 RCW, to qualify as a Washington Small Business, Bidder must meet three (3) requirements:

- a. Location: Bidder's principal office/place of business must be located in and identified as being in the State of Washington. A principal office or principal place of business is a firm's headquarters where business decisions are made and the location for the firm's books and records as well as the firm's senior management personnel.
- b. Size: Bidder must be owned and operated independently from all other businesses and have either: (a) fifty (50) or fewer employees or (b) gross revenue or less than seven million dollars (\$7,000,000) annually as reported on Bidder's federal income tax return, or its return filed with the Washington State Department of Revenue over the previous three consecutive years.
- c. WEBS Certification: Bidder must have certified its Washington Small Business status in Washington's Electronic Business Solution ([WEBS](#)).

According to Chapter 43.60A.190 RCW, to qualify as a Certified Washington Veteran-Owned Business, Bidder must meet four (4) requirements:

- a. 51% Ownership. Bidder must be at least fifty-one percent (51%) owned and controlled by:
  - 1) A veteran is defined as every person who at the time he or she seeks certification has received a discharge with an honorable characterization or received a discharge for medical reasons with an honorable record, where applicable, and who has served in at least one of the capacities listed in RCW 41.04.007;
  - 2) A person who is in receipt of disability compensation or pension from the Department of Veteran's Affairs; or
  - 3) An active or reserve member in any branch of the armed forces of the United States, including the national guard, coast guard, and armed forces reserves.
- b. Washington Incorporation/Location. Bidder must be either an entity that is incorporated in the State of Washington as a Washington domestic corporation or, if not incorporated, an entity whose principal place of business is located within the State of Washington.
- c. WEBS Certification. Bidder must have certified its Veteran-Owned Business status in Washington's Electronic Business Solution ([WEBS](#)).
- d. WDVA Certification. Bidder must have certification documentation to the Washington Department of Veteran's Affairs (WDVA) and be certified by WSVA and listed as such on WDVA's website ([WDVA](#) – Veteran-Owned Businesses).



DSHS encourages Washington Small, Veteran-owned, and MWBE Bidder participation both directly in Response to this Solicitation and as subcontractors to a Prime Bidder.

Bidders may contact the Office of Minority and Women's Business Enterprises (OMWBE) at <http://omwbe.wa.gov/> and/or the Department of Veterans Affairs at <http://www.dva.wa.gov/program/veteran-owned-business-certification> in order to obtain information on certified firms for potential subcontracting 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.

#### **10. Ds Auxiliary Aids and Limited English Proficient (LEP) Services:**

DSHS will provide access to this Solicitation document to individuals with disabilities and Limited English Proficient individuals. Please contact the Coordinator to request auxiliary aids and services.

If an individual believes that the Department has discriminated against them based on a protected status, please contact the DSHS Investigations Unit for the Nondiscrimination Policy Brochure and complaint process. The brochure can be found at <https://www.dshs.wa.gov/sites/default/files/publications/documents/Non-discrim%2022-171.pdf>

#### **11. Accessibility**

The Apparent Successful Bidder under this Solicitation will be required to represent and warrant that they will exercise commercially reasonable efforts to comply with the Office of Chief Information Officer (OCIO) Standard 188.10 – Minimum Accessibility Standard located at <https://ocio.wa.gov/policy/minimum-accessibility-standard>. The ASB will additionally be required to regularly review its systems and at the commencement of the Contract, and annually thereafter, certify to DSHS that their Services meet OCIO Standard 188.10.

#### **12. Cost to Prepare Response**

DSHS will not be liable for any costs incurred by the Bidder in preparing, conducting a site assessment, or submitting a Response to this Solicitation.

#### **13. Acceptance of Solicitation Terms**

In submitting a Response, Bidder must include a signed Bid Submission Letter in the form set forth on Attachment B, as well as signed Bidder Certifications in the form set forth on Attachment C. Bidder must acknowledge that in submitting a Response, it accepts all terms of this Solicitation Document, including all of its Attachments, and that Bidder's Response constitutes a binding offer. Bidders may not alter or redline the solicitation terms or requirements in their Response. Submitting altered or redlined solicitation terms or requirements in the Bidder Response may result in bidder disqualification.

#### **14. Joint Proposals**

If Bidders submit a joint Response with one or more other persons or entities, these persons or entities must designate a prime Bidder. The prime Bidder will be DSHS's sole point of contact through the Procurement process. If selected as the Apparent Successful

Bidder, the prime Bidder shall sign the Contract and any amendments and will be liable and responsible to DSHS for all performance under the Contract.

#### **15. Withdrawal of Responses**

After a Response has been submitted, Bidders may withdraw their Response at any time up to the Response due date and time as specified in Section C.1, Solicitation Schedule. A written request to withdraw the Response must be submitted to the Coordinator. After withdrawing a Response, the Bidder may submit another Response at any time up to the Response submission date and time.

#### **16. Ownership of Responses**

All materials submitted in response to this Solicitation become the property of DSHS, unless received after the deadline in which case the Response shall be returned to the sender. DSHS shall have the right to use any of the ideas presented as part of the process in any manner as it deems appropriate or beneficial, regardless of whether it is contained in a Response that results in selection for a Contract.

#### **17. DSHS Award Options; Improvement of Bid Offers**

After Responses are received and written evaluations are completed, DSHS may (but shall not be required to) request best and final offers from one or more Responsible and Responsive Bidders. The written Responses of Bidders invited to provide a best and final offer may be re-evaluated and the point values may be adjusted based upon changes to pricing or proposed services, deliverables or methodologies that are included in a best and final offer, prior to DSHS' determination of the Apparent Successful Bidder.

Alternatively, after reviewing all Responses, DSHS may enter into negotiations with the highest ranked Responsive and Responsible Bidder in order to determine if the Bid may be improved before identification of the Apparent Successful Bidder.

DSHS shall not be required to request best and final offers or to enter into negotiations and reserves the right to make a Contract award without further discussion of the Response. Therefore, the Response should be submitted on the most favorable terms that Bidder intends to offer.

#### **18. Oral Interviews or Presentations**

After bids are received and written evaluations are completed, DSHS may request that one or more Responsible and Responsive bidders participate in oral interviews, presentations and/or demonstrations. Two rounds of oral interviews may be held, a preliminary interview of approximately 30 minutes and a final second round of interviews. If these interviews are held, additional points shall be awarded as set forth in Section E.3, Evaluation Criteria and Scoring of Responses.

#### **19. Announcement of Successful Bidder(s)**

DSHS shall announce the Apparent Successful Bidder(s) on WEBS on the date indicated in Section C.1., Solicitation Schedule. All announcements of Apparent Successful Bidders are subject to the negotiation of a Contract satisfactory to DSHS.

Bidders may request a debriefing conference with the Coordinator to discuss information regarding the review and/or evaluation of their bid and may, under certain circumstances, file a formal protest requesting that DSHS provide an identified remedy if Bidder believes certain types of errors occurred. A more detailed description of these processes is set forth in Section F, Debriefing and Protest Procedure.

## **20. Ethics, Policies and Law**

This Solicitation, the evaluation of Responses, and any resulting contract will be made in conformance with applicable Washington State laws and Policies.

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 Response. Bidders must include, in their Letter of Submittal, information regarding any current or former state employees who are employed by, or subcontracted with, Bidder.

**SECTION D**  
**INSTRUCTIONS REGARDING CONTENT, FORMAT AND SUBMISSION OF**  
**WRITTEN RESPONSES**

Bidders shall submit their Responses utilizing the forms set forth on Attachments B, C, D, E and F to this Competitive Solicitation. Each Attachment represents a separate section of the Response. Failure to complete and submit all required Attachments, and to sign them, if applicable, may result in Bidder disqualification. Responses should be typed in 12-point font and should be submitted in the following order with each section of the Response clearly labeled.

**1. Attachment B: Bid Submission Letter (Required, not scored)**

All Bidders must submit a completed bid submission letter in the form and with the minimum contents set forth on Attachment B, which must include all of the required acknowledgments and information. The Bid Submission Letter must be signed by an individual authorized to bind the Bidder contractually. Bidder's completed and signed Attachments B, C, and E, together with any documents that are required to be attached, and Bidder's answers to administrative questions set forth on Attachment D, Bidder Response Form, comprise the Administrative component of the Response.

**2. Attachment C: Bidder Certifications and Assurances (Required, not scored)**

All Bidders must submit the Bidder certifications and assurances form set forth on Attachment C, signed by an individual authorized to bind the Bidder contractually. Bidders may not alter or redline the Bidder Certifications and Assurances form in their Response. Submitting altered or redlined solicitation terms or requirements in the Bidder Response may result in Bidder disqualification.

**3. Attachment D: Bidder Response Form (Required, Portions Scored)**

Using Attachment D, Bidders must provide answers to the questions set forth on the Bidder Response Form to demonstrate satisfaction of administrative requirements and, as applicable to this Solicitation, their qualifications, approach and proposed pricing to provide the services as outlined in this Competitive Solicitation, including the Sample Contract set forth on Attachment A. The number of points allocated to each answer is indicated next to the question.

The Bidder Response Form is posted separately from this Solicitation document in Microsoft Word format. Except for limits that are noted on the Bidder Response Form, Bidders may utilize as much space as is reasonably required to respond to each question, provided all questions are repeated and remain numbered and ordered as set forth in Attachment D. If additional pages are needed, they should be attached to the page containing the initial portion of the Response to a question and should be marked clearly to indicate that they provide a continuation of Bidder's answer to a specific numbered question. Bidders should not submit product brochures, white papers, customer testimonials, cut sheets, or other pre-prepared materials in Response to any of the questions unless specifically requested.

Bidders must submit complete, well-organized explanatory answers that address all of the specific questions asked in the Bidder Response Form. Bidders should not assume that evaluators will be familiar with their businesses before conducting the evaluation.

Use of Attachment D assures that Bidder responds to specific questions in space immediately below those questions and helps to avoid confusion among evaluators about the question that is being responded to. In awarding points, evaluators shall not be obligated to search through the Bidder's answers to questions other than the one being reviewed in order to locate text that is responsive to the question being reviewed. Failure to use the form set forth on Attachment D (with the applicable questions set forth immediately above Bidder's answers), failure to respond to all questions and/or failure to submit any documents requested in the Bidder Response Form may result in Bidder disqualification.

If Bidder is awarded a Contract, DSHS may require that Bidder's Response to the Bidder Response Form be incorporated, in whole or in part, into the Contract.

#### **4. Attachment E: ORIA Programs Overview (Informational, Not Scored)**

All Bidders must review Attachment E: ORIA Programs Overview before submitting a bid for this procurement.

#### **5. Attachment F: Contractor Intake Form (Required, Not Scored)**

All Bidders must complete and sign the Contractor Intake Form (Form 27-043) attached to this competitive Solicitation as Attachment F. This form can be downloaded in Microsoft Word format for ease of completion at <https://www.dshs.wa.gov/office-of-the-secretary/forms>. Any copy of any business license is acceptable. However, unless Bidder is not required to have a business license, the successful Bidder will need to have a Washington Business License before the contract begins. Prior to performing any work, Bidder will need to obtain a business license, if one is required, through the Washington Department of Licensing. Their web address is: <https://bls.dor.wa.gov/> Bidder can provide its Washington business license, if required, after award.

#### **6. Proprietary Information/Public Disclosure**

Materials submitted in response to this Solicitation shall be deemed public records as defined by RCW 42.56. All Responses and accompanying documentation shall become the property of DSHS upon receipt and will not be returned.

The Bidder's Response must include, on Attachment D, a statement identifying the pages of its Response, if any, which contain information the Bidder considers proprietary (for the purposes of public disclosure). 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 Response proprietary. Doing so will not be honored and will disqualify your Response from further consideration.**

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

DSHS is required to publicly post the awarded Bidder(s)'s bid(s) and bid evaluation documents, upon completion of the Solicitation. DSHS shall redact these materials for

information identified as proprietary and post them on the DSHS website subsequent to the award of a contract.

**Bidders may not include any DSHS client information in their Responses. Doing so will result in disqualification of the Response from further consideration.** If you wish to include examples of any forms or processes, use a blank form or ensure that all client information is completely redacted.

## **7. Submission of Responses**

Bid Responses must be stored in an acceptable electronic format and, if applicable, hard copy format, as set forth in Section 7, below. Bid Responses must be emailed directly to the Coordinator at the email address provided on the cover sheet of this Solicitation Document. Bid Responses must be received by the Coordinator in their entirety on or before the due date and time set forth in Section C.1., Solicitation Schedule, unless a posted Amendment to this Competitive Solicitation changes this due date and time. Bidder's completed version of each of the Attachments B, C, D, and E, to this Competitive Solicitation shall be included as a separate attachment to the Bidder's email(s).

Bidders assume all risks for the timely submission of the Response. Bidders are responsible for allowing sufficient time to ensure timely electronic receipt of their Response by the Coordinator and, in Solicitation that also requires that hard copies of the Response be submitted, to ensure timely receipt via other delivery methods. DSHS does not assume responsibility for problems with the Bidder's email, network or problems with the mail, parking, traffic or the services of any third-party courier. However, if DSHS email is not working properly, appropriate allowances will be made.

DSHS will not accept late Responses, nor grant time extensions for individual Bidders. DSHS will disqualify any Response and withdraw it from consideration if it is received after the Response submission due date and time.

## **8. Acceptable Electronic Formats for Submission of Responses**

Attachment D, Bidder Response Form, should be submitted in Microsoft Word format. Other Response documents must be formatted in Portable Document Format (Adobe Acrobat PDF) or Microsoft Word, Excel, or PowerPoint. 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. When scanning documents to be submitted in PDF format, scanner resolution should be set to at least 200 dots per inch.

**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 Responses. If your Response approaches or exceeds 30MB, you must break it up and send it by more than one email so that no single email exceeds 30MB.**

## **9. Alternative Submission Methods**

Bidders wishing to request an alternative method for submitting their Response must contact the Coordinator at least ten (10) days before the Response Submission Date. No

alternative submission method will be accepted unless agreed to by the Coordinator in writing prior to the Response deadline.

## **SECTION E EVALUATION OF RESPONSES**

### **1. Bid Responsiveness; Administrative Review**

All Responses will be reviewed by the Coordinator to determine compliance with administrative and minimum qualification requirements and instructions specified in this Solicitation. DSHS may reject a Response as nonresponsive at any time for any of the following reasons:

- Incomplete Response.
- Submission of a Response that proposes services that deviate from the scope and technical requirements set forth in this document and Attachment A, Sample Contract, except as permitted in an Amendment to this Solicitation.
- Failure to meet the minimum Bidder qualifications or to comply with any requirement set forth in this Solicitation Document, including Attachments.
- Submission of incorrect, misleading, or false information
- History of prior unsatisfactory contractual performance

The Coordinator may contact any Bidder for clarification of the Response. If a Response is deemed non-responsive, it shall be removed from further consideration. DSHS shall notify non-responsive Bidder(s) of this determination and the supporting reasons. Bidders whose Responses are found to be non-responsive shall be disqualified from further evaluation and shall be notified in writing.

If a Response meets all administrative and Bidder qualification requirements and submittal instructions, DSHS shall continue with the Written Evaluation and, if applicable, the Oral Evaluation.

### **2. Errors in Bidder Response**

Bidders are responsible for all errors or omissions contained in their Responses. Bidders will not be allowed to alter Response documents after the deadline for Response submissions.

DSHS reserves the right to contact any Bidder for clarification of Response contents. In those cases where it is unclear to what extent a requirement has been addressed, the evaluation panel may, in their discretion and acting through the Coordinator, contact a Bidder to clarify specific matters in the submitted Response.

DSHS reserves the right to waive minor administrative irregularities contained in any Bidder Response.



### 3. Evaluation Criteria and Scoring of Responses

Following the administrative review, Responses shall be evaluated and points shall be awarded for the management, technical and cost proposal components of the Response, as applicable, based upon Bidder's responses to the questions set forth on Attachment D, Bidder Response Form. Additional evaluation points may be awarded for specific criteria not included on Attachment D, Bidder Response Form only if set forth in this Section.

The maximum number of points available for each Bidder is six hundred twenty-five (625) points. The maximum number of points that may be assigned with respect to specific questions is set forth on Attachment D, Bidder Response form. The overall breakdown for assignment of points in evaluating Responses to this Solicitation is as follows:

Management (Qualifications) Response.....	34 maximum points
Methodology Response.....	50 maximum points
Technical Response.....	144 maximum points
Cost Proposal (Quotations).....	30 maximum points
(*Optional) 1 <sup>st</sup> Round Oral Interview/Presentation.....	215 maximum points
(*Optional) 2 <sup>nd</sup> Round Oral Interview/Presentation.....	125 maximum points
-----	
Total 1	
-----	
EO 18-03 Response.....	27 maximum points
-----	
Total 2	
-----	
<b>Total Possible Points</b> .....	625 maximum points

### 4. Evaluation of Cost Proposal/Quotations

The Bidder who offers the lowest cost for each question of the Cost Proposal shall receive the maximum number of available Cost Proposal points. Bidders offering higher costs will receive proportionately fewer Cost Proposal points based on the lowest cost as follows:

(lowest bid / higher bid) \* available points = total cost points awarded

Bidder	Low-Cost Calculation <i>EXAMPLE</i>			Calculated Quotation Score
	Quotation Quest. #1	Low Cost %	Points Available	Points Awarded (Max 20 Points)
Bidder A	\$40.00	1.00	20	20
Bidder B	\$50.00	0.80	20	16
Bidder C	\$80.00	0.50	20	10

### 5. Written Bid Evaluation Process

DSHS shall designate an evaluation team of at least three (3) evaluators to review, evaluate, and score the written question responses. These evaluators will be selected

based on their qualifications, experience, capability and background. If oral interviews or presentations are conducted, additional evaluators may supplement or replace some or all of the individuals performing the written evaluation.

Evaluators shall assign scores up to the maximum points available. Individual evaluator points will be totaled and the average points for each Bidder will be calculated. The Bidder's average points earned for each question will be added together to determine the Bidder's total written evaluation points.

#### **6. Evaluation points for Executive Order 18-03 (Firms without Mandatory Individual Arbitration for Employees)**

Pursuant to RCW 39.26.160(3) (best value criteria) and consistent with [Executive Order 18-03 – Supporting Workers' Rights to Effectively Address Workplace Violations](#) (dated June 12, 2018), DSHS will evaluate bids for best value and provide a bid preference in the amount set forth on Attachment D, Bidder Response Form, to any bidder who certifies that their firm does NOT require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

Successful bidders who certify that their employees are NOT required to sign these clauses and waivers as a condition of employment will have an EO 18-03 section added to their Contract incorporating this Response and requiring notification to DSHS if they later require their employees to agree to these clauses or waivers during the term of the Contract.

#### **7. Bidder's References**

Once the written evaluations are completed, DSHS may contact the references provided by the top-ranked Bidder(s) in order to investigate past performance and validate information in Bidder Responses. In submitting a Response, Bidder agrees that it shall hold harmless DSHS and any individuals identified as references from and against liability resulting from the provision of information or the receipt and use of that information in evaluating Bidder's Response.

While additional points may be awarded for superior performance and reliability as demonstrated through references (see Section E.3. above), references are generally evaluated on a pass/fail basis. DSHS may reject a bid and consider a bidder as non-responsible if a reference provides negative information about a Bidder's past performance.

DSHS may, at any time, require additional or substitute references to determine the Bidder's experience and level of responsibility. If the reference check process reveals information that should properly be considered in evaluating Bidder's responses, DSHS may, in its sole discretion, reconvene the evaluation panel to reconsider the evaluation scoring in light of the information obtained.

**Oral Interviews or Presentations** In addition to evaluating the written Response, DSHS may invite one or more of the highest scoring Bidders to make oral interviews and presentations which shall be separately evaluated.

#### **8. Selection of Apparent Successful Bidder**

The Bidder that receives the highest total number of possible points will be presented to DSHS management for consideration as a finalist for the Apparent Successful Bidder. In the event multiple Contracts will be awarded, the applicable number of top-scoring Bidders will be considered.

The selection process shall determine which Bidder provides the best value in meeting the needs of DSHS. Selection of the Apparent Successful Bidder(s) depends upon DSHS' assessment of multiple factors, including Bidders' qualifications, capabilities, efficiency, experience, reliability, responsibility, integrity, quality of proposed services and deliverables, timeliness, cost and potential impact on DSHS' needs. DSHS may consider whether the Response encourages diverse contractor participation; whether the Bid provides competitive pricing, economies and efficiencies; whether the Bidder considers human health and environmental impacts; whether the Response appropriately weighs cost and non-cost considerations; and life cycle cost, as applicable. DSHS may also consider a Bidder's performance on prior State or other contracts and may reject Responses of any Bidder who has failed to perform satisfactorily under any previous contract with the state or another party. DSHS reserves the right to select a Bidder whose Response is deemed to offer the best overall value and that is in the best interests of DSHS and the State of Washington.

DSHS management shall make the final determination as to which Bidder(s), initially designated as finalist(s), shall be officially selected and announced on WEBS as the Apparent Successful Bidder(s) on or about the date and time set forth in Section C.1., Solicitation Schedule. DSHS may also notify the Apparent Successful Bidder(s) and the unsuccessful Bidder(s) of its determination via email on or about the date and time specified in Section C.1., Solicitation Schedule.

DSHS' decision will be subject to the execution of a Contract satisfactory to DSHS within a reasonable period of time following the announcement of the Apparent Successful Bidder on WEBS. In the event the parties are unable to reach agreement on the final details of a Contract, consistent with Attachment A, Sample Contract, DSHS shall have the option of negotiating with the next highest ranked Bidder and of revising the announcement of the Apparent Successful Bidder.

## **SECTION F BIDDER DEBRIEFING AND PROTEST PROCEDURE**

### **1. Debriefing Conferences**

No later than 5:00 p.m. on the third business day following the posted announcement of Successful Bidder on WEBS, Bidders may send an email to the Coordinator requesting a Debriefing Conference. Unless a different date is agreed upon by the Coordinator, the Debriefing Conference will be held on a date designated in Section C.1., Solicitation Schedule. Discussion at the debriefing conference will be limited to the following:

- If the Bidder's proposal was rejected, the reason for its rejection.
- Evaluation and scoring of the Bidder's Response.
- Critique of the Response based on the evaluation.
- Review of Bidder's final score in comparison with the other final scores.

No comparisons between Bids will be allowed during the Debriefing Conference, which shall be conducted by telephone, unless the Coordinator agrees to an in-person meeting and shall last for a maximum period of thirty (30) minutes.

### **2. Grounds and Filing of Protests**

A Bidder who has participated in a Debriefing Conference may file a formal Protest if the Bidder asserts that there are facts that indicate error in the evaluation of Bids on one or more of the following grounds:

- Bias, discrimination or conflict of interest on the part of the evaluator or in the process.
- Mathematical errors in computing the score.
- Non-compliance with procedures described in the Solicitation document or in DES policy.

Protests must be emailed to the Solicitation Coordinator and must be received no later than 5:00 p.m. (Pacific Time) on the fifth (5th) business day following the day of the Bidder's Debriefing Conference. The Protest must adhere to the requirements set forth in this Section or it will not be considered. This Protest procedure constitutes the sole administrative remedy available to Bidders from DSHS under this Solicitation.

Protests must include the protestor's mailing address and phone number and the name of the individual responsible for filing the Protest. The Protest must state the Solicitation number and title, the grounds for the Protest, specific facts to support these grounds, and a description of the relief or corrective action being requested.

Protests not based on one of the grounds set forth in this Section will be rejected. It is not grounds for a protest to question an evaluator's professional judgment on the quality of a Response or DSHS' assessment of its own needs or requirements.

### **3. DSHS Protest Review Process**

The Coordinator will immediately forward any Protest to the Chief of Central Contracts and Legal Services to assign to a Protest Coordinator for review. The Protest Coordinator, an individual who was not involved in the Solicitation, will consider the record and all available facts and will endeavor to issue a decision within ten (10) business days following receipt of the Protest. If additional time is required, the protesting party will be notified of the delay.

In the event a Protest may involve the conduct of or information submitted by another Bidder that also submitted a Response, such Bidder will be given an opportunity to submit its views and any relevant information on the issue(s) raised by the protest to the Solicitation Coordinator.

#### **4. Determination of Protests**

The Protest Coordinator shall issue a written determination regarding the Protest. This written determination shall include one or more of the following determinations:

- Upholding DSHS determination of the Apparent Successful Bidder(s) on the basis that there are insufficient facts to establish the alleged error; or
- Upholding DSHS' determination of the Apparent Successful Bidder(s) on the basis that there are only technical or harmless errors in DSHS' evaluation process; or
- Finding errors and identifying actions which may be taken by DSHS, such as:
  - i. Correction of errors and reevaluation of all bids,
  - ii. Cancellation and reissuance of the Solicitation (in which case all the Bidders will be notified), or
  - iii. Other corrective actions as may be appropriate.

There is no further administrative process or remedy available within DSHS to appeal the determination that resulted in a Protest. If the protesting party does not accept DSHS' determination, the protesting party can seek relief from Superior Court in Thurston County, WA.

## **SECTION G**

### **CONTRACTING PROCEDURES**

#### **1. Contract Execution**

The Apparent Successful Bidder(s) is expected to sign a contract with DSHS that is substantially the same as Attachment A, Sample Contract, included with this Solicitation, and to enter into any subsequent Contract amendments that may be required to address specific work or services.

DSHS reserves the right to require that some or all of Bidder's Response be incorporated into the Contract, and to negotiate the specific wording of the Statement of Work, based on the requirements of this Solicitation and the terms of the Response submitted by the Apparent Successful Bidder. If changes are requested as part of the Bid Response, DSHS may consider, but shall be under no obligation to agree to, modifications to the General Terms and Conditions of Attachment A, Sample Contract.

If the Apparent Successful Bidder fails or refuses to sign a Contract within ten (10) business days of delivery by DSHS, DSHS may elect to designate the next highest-ranked finalist as the Apparent Successful Bidder.

#### **2. Security Design Review**

The Apparent Successful Bidder (ASB) will be required to pass a DSHS Security Design review prior to full Product implementation. The ASB will need to demonstrate how their system meets all of the security requirements included in the Office of the Chief Information Officer (OCIO) [Standard 141.10](#). If the Solution does not pass the Security Design review, the Contract will not be issued. Any security requirements that are agreed to may be written into the Contract.

#### **3. Federal and State Regulatory Compliance. The ASB:**

- (1) Will adhere to DSHS Security Policies and Standards.
- (2) Will adhere to Washington State Office of Cyber Security (OCS) policies and standards, including Security Design Review requirements specified in Section 2.
- (3) Will adhere to any applicable federal compliance regulations, policies and standards applicable, including IRS Pub. 1075, to the programs which will be supported by the Solution.
- (4) Will ensure and demonstrate that Solution is in compliance with State OCIO and Federal standards.

#### **4. Insurance**

The Apparent Successful Bidder shall provide evidence of its compliance with the insurance requirements included on Attachment A, Sample Contract.

#### **5. Non-Endorsement**

The award of a Contract is not an endorsement by the State or DSHS of the Bidder or Bidder's Services and shall not be represented as such by Bidder in any advertising or other publicity materials.

By submitting a Response to this Solicitation, the Bidder agrees to make no reference to DSHS in any literature, promotional materials, brochures, sales presentations or the like without the prior written consent of DSHS.

## **6. Background Checks**

Individuals who will be performing the Contract on behalf of the Apparent Successful Bidder may be required to undergo background checks. Individuals who have disqualifying results (showing crimes and/or negative actions) may not be permitted to provide Services under the Contract.

## **7. Electronic Payment**

The State prefers to utilize electronic payment in its transactions. The successful Bidder will be required to register in the Statewide Vendor Payment system, <https://ofm.wa.gov/it-systems/statewide-vendorpayee-services>, prior to submitting a request for payment under their Contract. No payment shall be made until the registration is completed.

## **8. Subcontractor / Prompt Payment & Retainage**

The Apparent Successful Bidder (ASB) is required to pay each subcontractor for satisfactorily completed work performed under this prime Contract within thirty (30) days from the receipt of each payment the ASB receives from the Agency. ASB further agrees to return any retainage payments to each subcontractor within thirty (30) days after the subcontractor's work is satisfactorily completed and any liens have been secured. Any delay or postponement of payment within this time period may occur only for a good cause following written approval of the Agency. In addition, the Agency will not pay the ASB for subcontractor work unless the ASB can show that a prompt payment method for subcontractors is established.

If the Contract that results from the Solicitation includes the use of a subcontractor(s), the above clause will be added to the Contract requiring prompt payment and retainage for subcontractor(s).