

**STATE OF WASHINGTON
OFFICE OF THE SECRETARY OF STATE
OLYMPIA, WASHINGTON**

**REQUEST FOR PROPOSALS
RFP NO. 24-09**

PROJECT TITLE: Washington State Public Libraries Survey Collection Instrument

PROPOSAL DUE DATE:
August 22, 2024

EXPECTED TIME PERIOD FOR CONTRACT:

If a migration is needed, August 1, 2024 is earliest to accommodate a November 1, 2024 start through – October 31, 2025, with possible one-year extensions through 2029.

CONTRACTOR ELIGIBILITY:

This solicitation shall be awarded to a certified minority-, women-, or veteran owned business. Businesses responding to this solicitation not certified as minority-, women-, or veteran owned business will be rejected unless no certified minority-, women-, and veteran owned business become eligible for award.






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

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1. INTRODUCTION

1.1 PURPOSE AND BACKGROUND

The State of Washington, Office of the Secretary of State, Washington State Library Division (OSOS) is initiating this Request for Proposals (RFP) to solicit proposals for providing an online, Software as a Service (SaaS) instrument to collect the annual Public Libraries Survey. Washington's survey preparation, collection, cleaning and final submission usually runs from November to late June each year ("Group 2" schedule).

The OSOS has long used an online collection tool for the annual survey, which has been collected nationwide since the 1980s. Library respondents manually enter responses, which are validated and flagged if they are unexpectedly out of range or otherwise suggest an error. OSOS can monitor libraries' progress during the submission period. After submission, OSOS can download submissions as a spreadsheet for review, cleaning and final submission via the Library Services and Technology Act (the "*LSTA*") originating from the Institute of Museum and Library Services (the "*IMLS*").

1.2 OBJECTIVE

At minimum OSOS seeks to maintain all current features of its online survey collection instrument.

Although manual data entry should always remain an option, OSOS strongly prefers an instrument with options for automatically ingesting as much data as possible, via API or other programmatic means. Even Washington state's smallest libraries use automated systems to manage cardholders and collections, provide internet, or schedule events. Many of these systems can export data in machine-readable form. Section 3.2 (*Technical Proposal*) includes a partial list of such systems used by Washington public libraries.

OSOS also welcomes additional optional features that make collected data more useful to responding libraries themselves. These might include, for example, reports or dashboards that libraries can use in real time, or infographics that can be used for reports to the community and supervisory bodies.

1.3 MINIMUM QUALIFICATIONS

By the time of contract execution, Contractor must be registered to do business with the state and have a current Unified Business Identifier (UBI).. Contractors are preferred who have experience in online survey collection or application development.

1.4 PERIOD OF PERFORMANCE

If a migration is needed the period of performance will begin August 1, 2024, to allow time for that process. August 1, 2024 is earliest to accommodate a November 1, 2024 start through – October 31, 2025. OSOS reserves the right to extend the contract for four (4) one-year periods. Any extension will be subject to mutual agreement between OSOS and the Contractor. The total contract term may not exceed five (5) years (2029).

1.5 DEFINITIONS

Definitions for the purposes of this RFP include:

- **Apparent Successful Bidder** – the Contractor identified by OSOS, after evaluation of Proposals, who is recommended for contract award.
- **Contractor** – the individual or company submitting a Proposal in order to attain a contract with OSOS.
- **OSOS** – The Office of the Secretary of State, the agency of the state of Washington that is issuing this RFP.
- **Proposal** – A formal offer submitted in response to this solicitation.
- **RFP** – This request for proposals.
- **WEBS** -Washington's Electronic Business Solution, an online Contractor registration and bid notification system.

1.6 AMERICANS WITH DISABILITIES ACT (ADA) COMPLIANCE

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

1.7 FUNDING

Proposals are not limited to a not-to-exceed amount.

2. GENERAL INFORMATION FOR CONTRACTORS

2.1 RFP COORDINATOR

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

Name:	Kathleen Sullivan
Address:	6880 Capitol Blvd. SE
City, State, Zip Code:	Tumwater, WA 98501
Phone Number:	360-480-0097
Fax Number:	360.586.7575
Email Address:	kathleen.sullivan@sos.wa.gov

Email communication is strongly preferred. Any other communication will be considered unofficial and non-binding on OSOS. Contractors are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Contractor.

2.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue RFP	7/8
Question and Answer (Q&A) Period	7/9 - 26
Preproposal Conference	7/15
Publish Q&A's from Preproposal Conference on WEBS and OSOS website	7/17
Last Date for Questions	7/26
Publish complete list of Q&A's on WEBS and OSOS	7/30

Last Amendment to RFP	8/13
Last Date for Complaints	8/15
Proposals Due	8/22
Evaluate Proposals	8/23 – 9/20
Announce Apparent Successful Bidder (ASB) and Notify Unsuccessful Contractors	9/16
Hold Debriefing Conferences	See section 4.10
Protest	See section 4.10
Negotiate Contract	9/17-10/1
Begin Contract Work	10/2

OSOS reserves the right to revise the above schedule.

2.4 PREPROPOSAL CONFERENCE

A preproposal conference is scheduled to be held at 4 p.m. on 7/15/2024 at <https://us02web.zoom.us/j/84609507662>. Prospective Contractors may attend but are not required to attend. Written questions may be submitted in advance to the RFP Coordinator. OSOS shall be bound to written answers only. Any oral responses given at the preproposal conference shall be considered unofficial.

Within 5 business days of the conference, a copy of the questions and answers will be placed in WEBS and on the OSOS website here: <http://www.sos.wa.gov/office/procurements.aspx>.

2.5 SUBMISSION OF PROPOSALS

Contractors are required to submit an electronic copy of their proposal. The proposal must be received by the OSOS no later than 4:00p.m. Pacific Time on August 22, 2024. Attachments to the email must be in Microsoft Word, Microsoft Excel or Adobe PDF format.

The proposal is to be sent to the RFP Coordinator at the email address noted in section 2.1.

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

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

Include the Contractor's contact information, including name, title, email, and telephone number.

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

2.6 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

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

All proposals received shall remain confidential until the contract, if any, resulting from the RFP is signed by the authorized officer of OSOS and the Contractor; thereafter, the proposals shall be deemed public records as defined under the Public Records Act, RCW Chapter 42.56.

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

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

A charge will be made for copying and shipping, as outlined in RCW 42.56.120. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

2.7 REVISIONS TO THE RFP

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

2.7 SMALL & DIVERSE BUSINESSES

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

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

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

Washington Small Businesses. Contractors may contact OSOS about small and diverse business inclusion and qualification as a Washington Small Business. If you qualify as a Washington Small Business, identify yourself as such in WEBS. Call WEBS Customer Service at 360-902-7400. The qualification

requirements to self-certify as a Washington Small Business are set forth in Exhibit A-1 – Contractor’s Certification.

2.8 ACCEPTANCE PERIOD

Proposals must provide 60 days for acceptance by OSOS from the later of the due date for receipt of Proposals or receipt of best and final offers (if utilized). The contractor agrees that during the acceptance period it may not modify, withdraw, or cancel its Proposal.

2.9 RESPONSIVENESS

All Proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The Contractor is specifically notified that failure to comply with any part of the RFP may result in rejection of the Proposal as non-responsive.

OSOS also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

2.10 MOST FAVORABLE TERMS

OSOS reserves the right to make an award without further discussion of the Proposal submitted. Therefore, the Proposal should be submitted initially on the most favorable terms which the Contractor can propose. OSOS reserves the right to contact a Contractor for clarification of its Proposal. OSOS also reserves the right to enact a best and final offer (BAFO) process. If so enacted, the procedure is described in Section 4.

The Contractor should be prepared to accept this RFP, all amendments to this RFP, all clarifying responses, and a best and final offer, as applicable, for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Contractor’s Proposal. It is understood that the Proposal will become a part of the official procurement file on this matter without obligation to OSOS.

2.11 CONTRACT

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

2.12 COSTS TO PROPOSE

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

2.13 NO OBLIGATION TO CONTRACT

This RFP does not obligate the state of Washington or OSOS to contract for services specified herein.

2.14 REJECTION OF PROPOSALS

OSOS reserves the right at its sole discretion to reject any and all Proposals received without penalty and not to issue a contract as a result of this RFP.

2.15 COMMITMENT OF FUNDS

The Secretary of State or their delegate are the only individuals who may legally commit OSOS to the expenditure of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.16 ELECTRONIC PAYMENT

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

2.16 INSURANCE COVERAGE

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

Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The state will not be held responsible in any way for claims filed by the Contractor or its employees for services performed under the terms of the contract.

2.17 EVALUATION PREFERENCE

Pursuant to RCW 39.26.160(3) (best value criteria) and consistent with [Executive Order 18-03 – Supporting Workers' Rights to Effectively Address Workplace Violations](#) (dated June 12, 2018), OSOS will evaluate bids for best value and will provide a bid preference in the amount of 5% to any Contractor who certifies, pursuant to Exhibit A-1 – Contractor's Certification, that their firm does NOT require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

3. PROPOSAL CONTENTS

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

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

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

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

EXHIBIT A-1 – CONTRACTOR’S CERTIFICATION

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

ContractorName_CERTIFICATION.pdf. The certification must be complete. Where there are choices, bidders **must** check a box. The certification must be signed and submitted by a duly authorized representative of the Contractor.

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

EXHIBIT A-2 – CONTRACTOR’S PROFILE & REFERENCES

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

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

TECHNICAL PROPOSAL

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

The following describes required and preferred features for the survey collection instrument.

Please describe how your product and service will provide these features, noting previous experience and successes. Where relevant, the Contractor may provide links to similar products, or tutorials/video demonstrations of the product.

See the *Cost Proposal* section of this RFP for instructions about pricing for required and preferred features.

Contractor should address any absence of a required feature. Unexplained absence of required features may result in disqualification.

Functionality

The Contractor must provide an online, Software as a Service (SaaS) survey collection instrument displaying the survey reporting period’s required federal and supplemental state Public Libraries Survey questions, annotation fields and instructions/support content. The instrument must have at least the following functionality:

- **Manual data entry.** Respondents should always have the option to enter responses manually.
- **In-survey element definitions and instructions.** The respondent should not have to navigate away from survey page to access instructions for a question.
- **Prefilled fields.** The Contractor should be able to prefill fields as requested from a spreadsheet or other machine-readable format provided by OSOS.
- **Read-only fields** that cannot be changed by respondents.
- **Automatic, read-only totals** of component fields.
- **Embedded previous-year responses.**

- **Automatic saving** of entries, as well as Save manual options.
- **Data validation** for entries, including all so-called “edit checks” required by the federal government and others as requested by the state. This includes at least flagging entries that appear radically out of range compared with previous years or expected ranges, or that use improper data types (e.g., text when a number is expected). *Surveys must be able to be blocked from submission until all required fields have been completed, and any flagged entries have been corrected or annotated as required.*
- **Printing and export capacity.** Library systems should be able to export responses for current and previous surveys, in printer-friendly PDF as well as spreadsheet form. State Library must be able to export all current responses in spreadsheet format, by administrative entity, outlet and annotations.
- **Browser and hardware compatibility.** Survey instrument must be compatible with Firefox, Chrome, Safari, Edge and other common web browsers, and require no add-ins or special software to use. Survey instrument should work easily on Apple and Windows-based computers, updated to latest operating systems.
- **Compliance with federal and state security and privacy regulations.**
- **Accessibility.** Instrument must work with keyboard only, and with JAWS and NVDA screen readers. Compliance with WCAG 2.1 AA standards or higher strongly preferred.

The survey product will be even stronger with the following preferred features:

- **Ability to ingest responses programmatically** (via API, for example) from automated systems such as Integrated Library Systems, calendar software, routers, etc. *(See a partial list of Washington public libraries’ current Integrated Library Systems in the 2022 Public Libraries Survey results, columns 8.12 and 8.13 on the Technology tab of the Excel file version, found under Washington Public Library Statistics section on the Washington State Library Publications webpage: <https://www.sos.wa.gov/library/libraries/libdev/publications.aspx>)*
 - If your proposal includes this feature, **please provide pricing with and without this feature.** See the *Cost Proposal* section for more details.
- **Skip logic/blocking conflicting entries.** Survey instrument automatically blocks some fields or marks fields with N/A, given certain responses. For example, the instrument would not allow libraries to enter both a single total for an element, and component responses for that element.
- **In-page data validation flags.** Respondent doesn’t have to navigate to another “edit check” dashboard page.
- **Ability to display questions as matrices.**
- **Ability for library systems to keep internal carry-over notes in the survey,** in order to embed tips and institutional knowledge for the next year (e.g., where to find the information for a particular answer).
- **Capacity for multiple staff from a respondent library to enter data simultaneously,** e.g., one staff member completes the Programs questions while another completes Fiscal questions.
- Along with other additional useful functions, proposals may also include these optional functionalities.
- **ability for respondent libraries to create attractive online dashboards** from the data fed to the survey (if the survey automatically ingests from information systems), to better use their data in real time.

- **Ability to generate public-facing infographics or reports from survey data**, which can be used for reporting to library communities, funders, or supervisory authorities.

Interface

The survey instrument must have the following interface features:

- **Ease of use.** A person with basic web-browsing, keyboard and mouse skills should be able to navigate and respond to the survey, without assistance.
- **Embedded help content** that can be viewed without navigating away from the survey page.
- **Ability to embed text or pictures** in the online interface, along with questions.
- **Dashboards/status reports for each respondent library system**, summarizing progress, validation issues (“edit checks”) and remaining information needed for submission.

OSOS welcomes proposals with **other attractive or user-friendly interface features.**

Capacity and Authentication

The collection instrument must have the following capacity:

- **Ability to accept responses from all Washington state public library systems.** As of 2024, Washington state had 60 public library systems.
- **Distinct logins and passwords** for all library system respondents, as well as the Washington State Library (both administrative overview and distinct testing-site logins), updated each year.

Additional preferred features include,

- **Capacity to add additional library types as respondents.**
- **More State Library control over logins/passwords**, such as ability to reset passwords.
- **Additional useful capacity and authentication features.**

Administration and Backend Controls

The product must feature the following administration and backend control features:

- **An administrative account, as well as separate testing-site account** for State Library. The administrative account should display the status of library systems’ response (opened survey, submitted/locked), and allow access to the State Library to enter library systems’ surveys and update responses as needed.
- **Printing and export capacity.** State Library must be able to export immediately all current responses in spreadsheet format, by administrative entity, outlet and annotations.

The product will be even stronger with the following preferred features:

- **Optional backend/administrative control for the State Library**, to configure interface, amend questions and edit checks as desired. (The State Library may also choose to have the Contractor take care of all configuration and preparation.) If your proposal offers this feature, please describe in detail

any constraints (e.g., changes can be made only before survey opens/at any time; State Library may customize interface or question wording but not edit checks etc).

Hosting & Back-up

The product must provide,

- **Cloud-based hosting of current survey year entries, as well as 25 years** of previous surveys for each library system respondent.
- **Back-ups.** Please describe in detail where and how often current and previous survey content is backed up. Please note the geographic location of servers.

Customer Service, Training

- **Annual Survey Preparation Process.** Contractor must commit to annual time-sensitive process of working with the State Library on the following:
 - Process must begin no later than November 1 each year and have survey open by March 1 of the following year;
 - The survey must be updated with federal (required) and state (desired) changes; this applies to data elements (questions) themselves, instructions, validation, and information about responding libraries (branches, locations etc);
 - Contractor support team should incorporate annual federal (required) changes automatically into the current survey, with minimal input from State Library (e.g., designating which sections of the survey to place new elements);
 - Contractor should prefill any fields as requested by State Library;
 - Contractor should provide the tool for testing and correction, at least 4 weeks ahead of March 1 launch date.
- **Customer support after survey opens.** Please describe your services for responding to (1) urgent issues such as lost data, malfunctions, inability to access the survey, and (2) non-urgent questions from the State Library. Include details about time for response, number of staff assigned to respond, staff availability, the State Library's options for contacting staff.
- **Notification of changes.** Please provide details about how much notice the Contractor will give the State Library for service/product deprecations or changes.

The solution will be even stronger with additional features including the following:

- **Contractor-provided training content for survey**, including support webpages and on-demand tutorials.
- **Notifications or reminders** for respondents (e.g., one week until submission deadline).
- **Additional useful customer service, support or training features.**

Migration

Any new Contractor must commit to the following for the 2024 Public Libraries Survey:

- Must migrate historic survey data from 2000 to the present, for any current public library;
- Must complete migration by 1 November, 2024;
- Please provide details about the migration process, including how long it will take, any required work by the State Library or public libraries, and steps for troubleshooting and correction post-migration.

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

ContractorName_TECHNICAL.pdf.

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

MANAGEMENT PROPOSAL

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

A. Project Management

1. Project Team Structure/Internal Controls - Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.

2. Staff Qualifications/Experience – Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. Provide resumes for the named staff which include information on the individuals' particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. Contractor must commit that staff identified in its Proposal will actually perform the assigned work. Any staff substitution must have the prior approval of OSOS.

B. Experience of the Contractor

1. Indicate the experience the Contractor and any subcontractors have in the following areas:

- i. Preparing and collecting the Public Libraries Survey
- ii. Preparing other online survey collection instruments

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

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

ContractorName_MANAGEMENT.pdf.

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

COST PROPOSAL

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

Please provide tiered pricing proposals for the survey instrument *with* automatic ingestion of data from information systems (if your proposal includes this feature), and the survey instrument *without* this feature. The Contractor may provide additional tiered pricing for other optional/preferred features, but is not required to.

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

(SCORED – Up to a maximum of 65 points).

CONTRACT ISSUES LIST [IF APPLICABLE]

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

(NOT SCORED)

CONTRACTOR'S DIVERSE BUSINESS INCLUSION PLAN – SUBCONTRACTORS [IF APPLICABLE].

No form is provided for this submittal. This is a required submittal ONLY IF Contractor will be using subcontractors to perform the contract. If so, Contractor must outline its inclusion plan for diverse business subcontractors pertaining to the contract and submit it to the RFP Coordinator using the following file naming convention: ContractorName_INCLUSIONPLAN.pdf. (NOT SCORED)

4. EVALUATION AND CONTRACT AWARD

4.1 EVALUATION PROCEDURE

Proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by OSOS, which will determine the ranking of proposals. Both the Contractors' responsibility and the responsiveness of their proposals to this solicitation will be evaluated. In scoring against stated criteria, the evaluation team may consider such factors as accepted industry standards and comparative evaluation of other proposals in terms of differing price and quality. These scores will be used to determine the most advantageous proposal to OSOS.

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

4.2 RESPONSIBILITY

In determining whether a Contractor is responsible, OSOS will consider (1) the Contractor's ability, capacity, and skill to perform the contract; (2) the Contractor's character, integrity, reputation, judgment, experience, and efficiency; (3) whether the Contractor can perform the contract within the time specified; (4) the quality of Contractor's performance of previous contracts; (5) the previous and existing compliance by the Contractor with laws relating to the contract; (6) whether, within the three-year period immediately preceding the date of this RFP, the Contractor has been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in RCW 49.48.082, any provision of RCW Chapter 49.46, 49.48, or 49.52; and (7) such other information as may be secured having a bearing on the decision to award the contract.

4.3 RESPONSIVENESS

OSOS will initially classify all proposals as either "responsive" or "nonresponsive". OSOS may deem a proposal nonresponsive if (1) any of the required information is not provided; (2) the submitted price is found to be excessive or inadequate as measured by the RFP criteria; or (3) the proposal does not meet the RFP requirements and specifications. OSOS may find any proposal to be nonresponsive at any time during the procurement process. If OSOS deems a proposal nonresponsive, it will not be considered further. The RFP Coordinator will notify the Contractor by email.

4.4 EVALUATION WEIGHTING AND SCORING

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

Technical Proposal – 34%	70 points
Project Approach (15 points maximum)	
Quality of Work Plan (30 points maximum)	
Comprehensiveness of Product 15 points max)	
Other (10 points maximum)	
Management Proposal – 29%	60 points
Project Team Structure/Internal Controls (15 points maximum)	
Staff Qualifications/Experience (20 points maximum)	
Experience of the Contractor (15 points maximum)	
Other (10 points maximum)	
Cost Proposal – 32%	65 points
Executive Order 18-03 Evaluation Preference – 5%	10 points
<i>Sub-Total</i>	
	205
References & Demos (top-scoring Contractor(s) only)	
	25 points
GRAND TOTAL	

	230 points
--	------------

References will be contacted, and demonstrations/oral presentations scheduled for the top scoring Contractor(s) only, based on the written proposal. These will then be scored and included in the grand total.

The score for the cost proposal will be computed by dividing the lowest cost Proposal received by the Contractor's total cost. Then the resultant number will be multiplied by the maximum possible points for the cost section. References will be contacted for the top-scoring Contractor(s) only, based on the written Proposal. References will then be scored and included in the Grand Total.

4.5 DEMONSTRATIONS (ORAL PRESENTATIONS)

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

4.6 BEST AND FINAL OFFER (BAFO)

Contractors are encouraged to submit their most competitive offer, but there is a potential for a best and final offer (BAFO) process. This section defines that process.

OSOS reserves the right, at any point during the evaluation of proposals, to notify all remaining responsive and responsible Contractors that OSOS will require them to submit BAFOs. Contractors will not be allowed to make material changes to their proposals unless they receive a request for a BAFO from OSOS.

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

For purposes of the BAFO, Contractors may make such changes to their original proposals as they believe appropriate to enhance their potential for selection and award under the selection criteria set forth in the RFP and the BAFO notice. Changes to the original proposal must be clearly identified in the re-submitted proposal using the Track Changes function in Microsoft Word.

Evaluation of the BAFOs and selection of the Apparent Successful Bidder will be based upon the evaluation criteria set out in the RFP. Terms proposed as part of a BAFO must be in accordance with terms requested in this RFP and may not materially alter the requirements of the RFP. Contractors may

be requested to make an oral presentation regarding their BAFO. The evaluation team may accept or reject any information submitted in as BAFO.

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

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

4.7 REQUEST FOR DOCUMENTS

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

4.8 CONTRACT EXECUTION

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

4.9 NOTIFICATION TO CONTRACTORS

Contractors whose proposals are not selected for further consideration or award will be notified via facsimile or email.

4.10 COMPLAINT, DEBRIEFING, AND PROTEST PROCEDURES

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

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

1. **CRITERIA FOR COMPLAINT.** A formal complaint may be based only on one or more of the following grounds: (a) The solicitation unnecessarily restricts competition; (b) The solicitation evaluation or scoring process is unfair or flawed; or (c) The solicitation requirements are inadequate or insufficient to prepare a response.
2. **INITIATING A COMPLAINT.** A complaint must: (a) Be submitted to and received by the RFP Coordinator no less than five (5) business days prior to the proposal due date; and (b) Be in writing. A complaint should clearly articulate the basis of the complaint and include a proposed remedy.

3. **RESPONSE.** When a complaint is received, the RFP Coordinator (or designee) will consider all the facts available and respond in writing prior to the deadline for proposal submittals, unless more time is needed. OSOS is required to promptly post the response to a complaint on WEBS.
4. **RESPONSE IS FINAL.** The RFP Coordinator's response to the complaint is final and not subject to administrative appeal. Issues raised in a complaint may not be raised again during the protest period. Furthermore, any issue, exception, addition, or omission not brought to the attention of the RFP Coordinator prior to Proposal submittal may be deemed waived for protest purposes.

B DEBRIEF CONFERENCES. A debrief conference is an opportunity for a Contractor and OSOS to meet and discuss the Contractor's Proposal (and, as further explained below, is a necessary prerequisite to filing a protest). Following the evaluation of the proposals, OSOS will issue an announcement of the Apparent Successful Contractor. Contractors will have three (3) business days to request a debrief conference. Once a debrief conference is requested, OSOS will offer the requesting Contractor one meeting opportunity and notify the Contractor of the debrief conference place, date, and time. Please note, because the debrief process must occur before making an award, OSOS likely will schedule the debrief conference shortly after the announcement of the Apparent Successful Contractor and the Contractor's request for a debrief conference. OSOS will not allow the debrief process to delay the award. Therefore, Contractors should plan for contingencies and alternate representatives. Contractors who wish to protest must first participate in a debrief conference. Contractors who are unwilling or unable to attend the debrief conference will lose the opportunity to protest. Participation in a debrief conference is a prerequisite for a Contractor wishing to file a protest.

1. **TIMING.** A debrief conference may be requested by a Contractor following the announcement of the Apparent Successful Contractor.
2. **PURPOSE OF DEBRIEF CONFERENCE.** Any Contractor who has submitted a timely Proposal may request a debrief conference. A debrief conference provides an opportunity for the Contractor to meet with OSOS to discuss Contractor's Proposal and evaluation. It does not provide an opportunity to discuss other Contractor's proposals and evaluations.
3. **REQUESTING A DEBRIEF CONFERENCE.** The request for a debrief conference must be made in writing via email to the RFP Coordinator and received within three (3) business days after the announcement of the Apparent Successful Contractor. Debrief conferences may be conducted either in person at the OSOS offices in Olympia, Washington, or virtually (e.g., by telephone or web-based virtual meeting such as Zoom, Skype, MS Teams), as determined by OSOS, and may be limited by OSOS to a specified period of time. The failure of a Contractor to request a debrief conference within the specified time and attend a debrief conference constitutes a waiver of the right to submit a protest. Any issue, exception, addition, or omission not brought to the attention of the RFP Coordinator before or during the debrief conference may be deemed waived for protest purposes.

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

1. **CRITERIA FOR A PROTEST.** A protest may be based only on one or more of the following: (a) Bias, discrimination, or conflict of interest on the part of an evaluator; (b) Error in computing evaluation scores; or (c) Non-compliance with any procedures described in the solicitation.
2. **INITIATING A PROTEST.** Any Contractor that participates in a debrief conference may protest an award to the Apparent Successful Contractor. A protest must: (a) Be submitted to and received by the Protest Officer specified below, within five (5) business days after the protesting Contractor's debrief conference (see Form and Substance, and Other below); (b) Be in writing; (c) Include a specific and complete statement of facts forming the basis of the protest; and (d) Include a description of the relief or corrective action requested.

3. **PROTEST RESPONSE.** After reviewing the protest and available facts, the Protest Officer will issue a written response within ten (10) business days from receipt of the protest, unless additional time is needed.
4. **DECISION IS FINAL.** The protest decision is final and not subject to administrative appeal. If the protesting Contractor does not accept the protest response, the protesting Contractor may seek relief in Thurston County Superior Court.

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

1. **FORM, SUBSTANCE, & OTHER.** All complaints, requests for debrief, and protests must:
 - i. Be in writing;
 - ii. Be signed by the complaining or protesting Contractor or an authorized agent, unless sent by email;
 - iii. Be delivered within the time frame(s) outlined herein;
 - iv. Identify the solicitation number;
 - v. Conspicuously state "Complaint," "Debrief," or "Protest" in any subject line of any correspondence or email; and
 - vi. Be sent to the address identified below.
2. **COMPLAINTS & PROTESTS.** All complaints and protests must (a) State all facts and arguments on which the complaining or protesting Contractor is relying as the basis for its action; and (b) Include any relevant documentation or other supporting evidence.

E. HOW TO CONTACT OSOS

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

Kathleen Sullivan
6880 Capitol Blvd. SE
Tumwater, WA 98501
360-480-0097
360.586.7575
kathleen.sullivan@sos.wa.gov

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

Kathleen Sullivan
6880 Capitol Blvd. SE
Tumwater, WA 98501
360-480-0097
360.586.7575
kathleen.sullivan@sos.wa.gov

5. RFP EXHIBITS

Exhibit A A-1 Contractor’s Certifications
 A-2 Contractor’s Profile & References

Exhibit B Sample Contract

EXHIBIT A-1 – CONTRACTOR’S CERTIFICATION

Competitive Solicitation:	RFP No. 24-06 issued May 1, 2024		
Contractor:	_____ Type/print full legal name of Contractor		
Contractor’s Address:	_____ Type/print Contractor’s Address		
Contractor Organization Type: Check appropriate box	Corporation:	<input type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Limited Liability Company (LLC):	<input type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Partnership:	<input type="checkbox"/> Domestic	<input type="checkbox"/> Foreign
	Sole Proprietorship:	<input type="checkbox"/>	
State of Formation:	_____ Type/print the state where the corporation, LLC, or partnership is formed – e.g., ‘Washington’ if domestic and the name of the state if ‘Foreign’ (i.e., not Washington)		
Doing Business Under Another Name: Check appropriate box	State whether Contractor has been doing business under another name during the past five years: <input type="checkbox"/> Contractor has NOT done business under another name <input type="checkbox"/> Contractor HAS done business under another name If Contractor HAS done business under another name, provide the name(s) and addresses: Name: _____ Address: _____		

Contractor, through the duly authorized undersigned, makes this certification as a required element of submitting a responsive Proposal. Contractor certifies, to the best of its knowledge and belief that the following are true, complete, correct, and made in good faith:

1. **UNDERSTANDING.** Contractor certifies that Contractor has read, thoroughly examined, and fully understands all of the provisions in the solicitation (including all exhibits) and the terms and conditions of the contract and any amendments or clarifications to the solicitation, and agrees to abide by the same.
2. **ACCURACY.** Contractor certifies that Contractor has carefully prepared and reviewed its Proposal and fully attests to the accuracy of the same. Contractor further understands and acknowledges that OSOS shall not be responsible for any errors or omissions on the part of Contractor in preparing its Proposal. Contractor further certifies that the facts declared herein are true and accurate. Contractor further understands and acknowledges that the continuing compliance with these statements and all requirements of the solicitation are conditions precedent to the award or continuation of the resulting contract.
3. **NO COLLUSION, ANTI-COMPETITIVE PRACTICES, OR SHARING PROPOSAL INFORMATION.** Contractor certifies that Contractor has not: (1) either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competition; (2) improperly shared information with other Contractors in connection with this solicitation; and (3) made any attempt and shall not make any attempt to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition. If there is evidence of such communication, collusion, or anti-competitive activities among Contractors, OSOS reserves the right to disqualify such Contractors. Contractor, however, freely may join with other persons or organizations for the purpose of presenting a joint proposal.
4. **FIRM OFFER.** Contractor certifies that its Proposal pertaining to the above-referenced solicitation is a firm offer which cannot be withdrawn for a time period of sixty (60) days from and after the proposal due date specified in the solicitation. OSOS may accept such Proposal, with or without further negotiation, at any time within such period. In the event of a protest, Contractor's Proposal shall remain valid for such time period or until the protest and any related court action is resolved, whichever is later.
5. **CONFLICT OF INTEREST.** Contractor certifies that, in preparing its Proposal, Contractor has not been assisted by any current or former employee of the State of Washington whose duties relate (or did relate) to this solicitation or prospective contract and who was assisting in other than the employee's official, public capacity. Contractor further certifies that no such current or former public employee nor any member of such person's immediate family have any financial interest in the outcome of Contractor's Proposal.
6. **NO REIMBURSEMENT.** Contractor certifies that Contractor understands that the State of Washington will not reimburse Contractor for any costs incurred in the preparation of Contractor's Proposal. All proposals become the property of the State of Washington, and Contractor claims no proprietary right to the ideas, writings, items, or samples unless so stated in the Proposal.
7. **PERFORMANCE.** Contractor certifies that Contractor understands that its submittal of a Proposal and execution of this Contractor's Certification certifies Contractor's willingness to comply with the terms of the contract, if awarded such. By submitting this Proposal, Contractor hereby offers to furnish the goods and/or services solicited pursuant to this solicitation in compliance with all terms, conditions, and performance requirements

contained in this solicitation and the resulting contract or, if applicable, as detailed on a Contract Issues List, if permitted, in this solicitation.

8. INSURANCE. Contractor certifies as follows (*must check one*):

- CONTRACTOR HAS REQUIRED INSURANCE.* Contractor has attached a current, valid certificate of insurance for each and all of the required insurance coverages as specified in the contract (note: Contractor must attach the insurance certificate).

OR

- CONTRACTOR WILL OBTAIN REQUIRED INSURANCE.* Contractor does not have a current, valid certificate of insurance for each and all of the required insurance coverages as specified in the contract but, if designated as the Apparent Successful Contractor, Contractor will provide such a certificate of insurance, without exception of any kind, to OSOS within twenty-four (24) hours of such designation or notification by OSOS or be deemed a nonresponsive Proposal.

OR

- CONTRACTOR DOES NOT HAVE REQUIRED INSURANCE.* As detailed on the attached explanation (Contractor to provide), Contractor does not have a current, valid certificate of insurance for each and all of the required insurance coverages as specified in the contract and, if designated as the Apparent Successful Contractor would not be able to provide such a certificate of insurance to OSOS within twenty-four (24) hours of such designation.

9. DEBARMENT. Contractor certifies as follows (*must check one*):

- NO DEBARMENT.* Contractor and/or its principals are not presently nor has ever been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from contracting with any federal, state, or local governmental entity within the United States.

OR

- DEBARRED.* As detailed on the attached explanation (Contractor to provide), Contractor and/or its principals presently are debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from contracting with a federal, state, or local governmental entity within the United States.

10. CRIMINAL OFFENSE. Contractor (including Contractor's officers) certifies as follows (*must check one*):

- NO CRIMINAL OFFENSE.* Contractor has not, within the three (3)-year period preceding the date of this solicitation, been convicted or had a civil judgment rendered against Contractor for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a governmental contract; violation of any federal or state antitrust statute; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property. Contractor further certifies that it is not presently indicted or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated in this paragraph.

OR

- CRIMINAL OFFENSE.* As detailed on the attached explanation (Contractor to provide), within the three (3)-year period preceding the date of this solicitation, Contractor has been convicted or had a civil judgment rendered against Contractor for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a governmental contract; violation of any federal or state antitrust statute; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.

11. WAGE THEFT PREVENTION. Contractor certifies as follows (*must check one*):

- NO WAGE VIOLATIONS.* Contractor has NOT been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in [RCW 49.48.082](#), any provision of RCW chapters [49.46](#), [49.48](#), or [49.52](#) within three (3) years prior to the date of the above-referenced solicitation date.

OR

- VIOLATIONS OF WAGE LAWS.* Contractor has been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in [RCW 49.48.082](#), a provision of RCW chapters [49.46](#), [49.48](#), or [49.52](#) within three (3) years prior to the date of the above-referenced solicitation date.

12. CIVIL RIGHTS. Contractor certifies as follows (*must check one*):

- COMPLIANCE WITH CIVIL RIGHTS REQUIREMENTS.* Contractor complies with all applicable requirements regarding civil rights. Such requirements prohibit discrimination against individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity, or national origin.

OR

- NON-COMPLIANCE WITH CIVIL RIGHTS REQUIREMENTS.* Contractor does not comply with all applicable requirements regarding civil rights.

13. WORKERS' RIGHTS ([EXECUTIVE ORDER 18-03](#)). Contractor certifies as follows (*must check one*):

- NO MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES.* Contractor 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.

OR

- MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES.* Contractor requires its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

14. TERMINATION FOR DEFAULT OR CAUSE. Contractor certifies as follows (*must check one*):

- NO TERMINATION FOR DEFAULT OR CAUSE.* Contractor has not, within the three (3)-year period preceding the date of this solicitation, had one (1) or more federal, state, or local governmental contracts terminated for cause or default.

OR

- TERMINATION FOR DEFAULT OR CAUSE.* As detailed on the attached explanation (Contractor to provide), within the three (3)-year period preceding the date of this solicitation, Contractor has had one (1) or more federal, state, or local governmental contracts terminated for cause or default.

15. TAXES. Contractor certifies as follows (*must check one*):

- TAXES PAID.* Except as validly contested, Contractor is not delinquent and has paid or has arranged for payment of all taxes due to the State of Washington and has filed all required returns and reports as applicable.

OR

- DELINQUENT TAXES.* As detailed in the attached explanation (Contractor to provide), Contractor has not paid or arranged for payment of all taxes due to the State of Washington and/or has not timely filed all required returns and reports as applicable.

16. FINANCIALLY SOLVENT. Contractor certifies as follows (*must check one*):

- FINANCIALLY SOLVENT.* Contractor is financially stable and solvent, has adequate cash reserves to meet all financial obligations, has not commenced bankruptcy proceedings voluntarily or otherwise, and is not subject to any judgments, liens, or encumbrances of any kind affecting title to any goods or services that are the subject of this solicitation.

OR

- NOT FINANCIALLY SOLVENT.* As detailed on the attached explanation (Contractor to provide), Contractor is not financially stable and solvent – i.e., Contractor does not have adequate cash reserves to meet all financial obligations, has commenced bankruptcy proceedings voluntarily or otherwise, or is subject to a judgment, lien, or encumbrance that affects title to the goods or services that are the subject of this solicitation.

17. LAWFUL REGISTRATION. Contractor, if conducting business other than as a sole proprietorship (e.g., Contractor is a corporation, limited liability company, partnership) certifies as follows (*must check one*):

- CURRENT LAWFUL REGISTRATION.* Contractor is in good standing in the State of Washington and the jurisdiction where Contractor is organized, including having timely filed all required annual reports.

OR

- DELINQUENT REGISTRATION.* As detailed on the attached explanation (Contractor to provide), Contractor currently is not in good standing in the State of Washington and/or the jurisdiction where Contractor is organized.

18. REGISTRATION WITH WASHINGTON SECRETARY OF STATE. Contractor certifies as follows (must check one):

CONTRACTOR IS REGISTERED WITH WASHINGTON SECRETARY OF STATE. Contractor is registered with the Washington Secretary of State, such registration is active, and Contractor has the following Unified Business Identifier (UBI) number: ____ ____ ____.

OR

CONTRACTOR WILL REGISTER WITH WASHINGTON SECRETARY OF STATE. Contractor is not registered with the Washington Secretary of State but, if designated as an Apparent Successful Contractor, Contractor will register with the Washington Secretary of State to obtain a UBI number and provide proof of such registration satisfactory to OSOS within twenty-four (24) hours of such designation or notification by OSOS or be deemed a nonresponsive Proposal.

OR

CONTRACTOR IS NOT REGISTERED WITH WASHINGTON SECRETARY OF STATE. Contractor is not registered with the Washington Secretary of State and Contractor declines to register with the Washington Secretary of State. *Note:* OSOS requires all awarded Contractors (including Washington firms and out of state firms) to be registered with the Washington Secretary of State. Contractors who are not registered will not be awarded a contract.

19. REGISTRATION WITH WASHINGTON STATE DEPARTMENT OF REVENUE. Contractor certifies as follows (must check one):

CONTRACTOR IS REGISTERED WITH WASHINGTON STATE DEPARTMENT OF REVENUE. Contractor is registered with the Washington State Department of Revenue, has a business license to do business in Washington, and has the following Unified Business Identifier (UBI) number: ____ ____ ____.

OR

CONTRACTOR WILL REGISTER WITH WASHINGTON STATE DEPARTMENT OF REVENUE. Contractor is not registered with the Washington State Department of Revenue but, if designated as an Apparent Successful Contractor, Contractor will register with the Washington State Department of Revenue for a business license and provide proof of such registration satisfactory to OSOS within twenty-four (24) hours of such designation or notification by OSOS or be deemed a nonresponsive Proposal.

OR

CONTRACTOR IS NOT REGISTERED WITH WASHINGTON STATE DEPARTMENT OF REVENUE. Contractor is not registered with the Washington State Department of Revenue and Contractor declines to register with the Washington State Department of Revenue. *Note:* OSOS requires all awarded Contractors (including Washington firms and out of state firms) to be registered with the Washington State Department of Revenue. Contractors who are not registered will not be awarded a contract.

20. SUBCONTRACTORS. Contractor certifies as follows (must check one):

NO SUBCONTRACTORS. If awarded a contract, Contractor will not utilize

subcontractors to provide the goods and/or services subject to this solicitation.

OR

- SUBCONTRACTORS.** As detailed on the attached Exhibit A-2 Contractor's Profile and References, if awarded a contract, Contractor will utilize subcontractor(s) to provide the goods and/or services subject to this solicitation. In such event, Contractor further certifies that, as to the State of Washington, Contractor shall retain responsibility for its subcontractors, including, without limitation, liability for any subcontractor's acts or omissions. Note: Contractor must provide the precise legal name (including state of organization), business address, and federal tax identification number (TIN) for each subcontractor. Note: If the TIN is a SSN, do not provide the SSN.

21. **WASHINGTON SMALL BUSINESS.** Contractor certifies as follows (*must check one*):

- WASHINGTON SMALL BUSINESS.** Contractor is a Washington small business as defined in RCW 39.26.010. To qualify as a Washington Small Business, Contractor must meet three (3) requirements:
 - **Location.** Contractor'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.
 - **Size.** Contractor must be owned and operated independently from all other businesses and have either: (a) fifty (50) or fewer employees; or (b) gross revenue of less than seven million dollars (\$7,000,000) annually as reported on Contractor's federal income tax return, or its return filed with the Washington State Department of Revenue over the previous three consecutive years).
 - **WEBS Certification.** Contractor must have certified its Washington small business status in Washington's Electronic Business Solution ([WEBS](#)).

OR

- NOT WASHINGTON SMALL BUSINESS.** Contractor does not qualify as a Washington small business as defined in RCW 39.26.010.

22. **CERTIFIED VETERAN-OWNED BUSINESS.** Contractor certifies as follows (*must check one*):

- CERTIFIED VETERAN-OWNED BUSINESS.** Contractor is a certified veteran-owned business under RCW 43.60A.190. To qualify as a certified veteran-owned business, Contractor must meet four (4) requirements:
 - **51% Ownership.** Contractor must be at least fifty-one percent (51%) owned and controlled by:
 - (a) A veteran as 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;

- (b) A person who is in receipt of disability compensation or pension from the department of veteran's affairs; or
- (c) 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.

- *Washington Incorporation/Location.* Contractor 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.
- *WEBS Certification.* Contractor must have certified its veteran-owned business status in Washington's Electronic Business Solution ([WEBS](#)).
- *WDVA Certification.* Contractor must have provided certification documentation to the Washington Department of Veterans' Affairs (WDVA) and be certified by WDVA and listed as such on WDVA's website ([WDVA – Veteran-Owned Businesses](#)).

OR

- NOT A CERTIFIED VETERAN-OWNED BUSINESS.* Contractor does not qualify as a certified veteran-owned business.

23. REFERENCES. Contractor certifies that the references provided to OSOS have worked with Contractor and that such individuals and firms have full permission, without any additional requirement or release, to provide such references and information to OSOS. Contractor hereby authorizes OSOS (or its agent) to contact Contractor's references and others who may have pertinent information regarding Contractor's prior experience and ability to perform the work set forth in this solicitation. Contractor hereby authorizes such individuals and firms to provide such references and release to OSOS information pertaining to the same.

Contractor further certifies that it shall provide immediate written notice to OSOS if, at any time prior to a contract award, Contractor learns that any of its certifications set forth herein were erroneous when submitted or have become erroneous by reason of changed circumstances.

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am duly authorized to make these certifications on behalf of the Contractor listed herein.

CONTRACTOR NAME: _____
Print Name of Contractor – Print full legal entity name of the firm submitting the Bid

By: _____
Signature of Contractor’s authorized person Print Name of person making certifications for Contractor

Title: _____ Place: _____
Title of person signing certificate

Date: _____ — Print city and state where signed

Return this Contractor’s Certification to the RFP Coordinator at:
kathleen.sullivan@sos.wa.gov

(Date) (Location) (Date) (Location)

(Location)

EXHIBIT A-2 – CONTRACTOR’S PROFILE & REFERENCES

Competitive Solicitation:	RFP No. 24-06 issued May 1, 2024
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CONTRACTOR’S INFORMATION PROFILE	
Contractor:	<hr style="width: 80%; margin: 0 auto;"/> Type/print full legal name of Contractor
Contractor’s Address:	<hr style="width: 80%; margin: 0 auto;"/> Business Name <hr style="width: 80%; margin: 0 auto;"/> Address <hr style="width: 80%; margin: 0 auto;"/> City, State, Zip Code
Contractor’s Unified Business Identifier Number (UBI):	UBI No. ____ _
Contractor’s Taxpayer Identification Number (TIN):	_____

Note: A nine digit UBI number is assigned to each registered business in Washington.

Note: Your TIN will be either a number issued by the IRS (e.g., Employer Identification Number, Federal Tax Identification Number) or a number issued by the Social Security Administration (i.e., your Social Security Number). Do Not provide a Social Security Number.

<p>Is your firm certified as a minority- or woman-owned business with the Washington State Office of Minority and Women’s Business Enterprises (OMWBE)?</p>	<p style="text-align: center;">Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, provide Contractor’s MWBE certification no.:</p> <p style="text-align: center;">_____</p>
<p style="text-align: center;">Is your firm a self-certified Washington State Small Business?</p> <p><i>Note: See Exhibit A-1 – Contractor’s Certification for criteria to qualify as a Washington State Small Business.</i></p> <p><i>Note: Regardless of size, a qualifying business must be owned and operated independently from all other businesses. In regard to size, the gross revenue thresholds, as reported on Contractor’s tax returns, are as follows:</i></p> <ul style="list-style-type: none"> ▪ Microbusiness: Annual gross revenue of less than \$1,000,000 ▪ Minibusiness: Annual gross revenue of more than \$1,000,000, but less than \$3,000,000 ▪ Small Business: Annual gross revenue of less than \$7,000,000 over each of the three prior consecutive years. 	<p style="text-align: center;">Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, provide the location for Contractor’s principal place of business:</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">Street Address</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">City, State, Zip Code</p> <p>If yes, what is your business size (based on annual gross revenue)?</p> <p style="text-align: right;">Microbusiness <input type="checkbox"/></p> <p style="text-align: right;">Minibusiness <input type="checkbox"/></p> <p style="text-align: right;">Small Business <input type="checkbox"/></p>
<p>Is your firm certified as a Veteran-Owned Business with the Washington State Department of Veteran Affairs?</p> <p><i>Note: See Exhibit A-1 – Contractor’s Certification for criteria to qualify as a Certified Veteran-Owned Business.</i></p>	<p style="text-align: center;">Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, provide Contractor’s WDVA certification no.:</p> <p style="text-align: center;">_____</p>

<p>CONTRACTOR'S PRIMARY POINTS OF CONTACT:</p>	<p>Authorized Representative:</p> <p>Name: _____</p> <p>Email: _____</p> <p>Phone: _____</p> <p>Contract Administrator:</p> <p>Name: _____</p> <p>Email: _____</p> <p>Phone: _____</p>
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REFERENCES

Provide at least three (3) references for Contractor including company name, contact name, title, phone number, email address, and a description of the work engagement upon which the reference is based.

CONTRACTOR REFERENCES	
Company Name: Contact Name: Title: Phone: Email:	Description of Work Engagement:
Company Name: Contact Name: Title: Phone: Email:	Description of Work Engagement:
Company Name: Contact Name: Title: Phone: Email:	Description of Work Engagement:
Company Name: Contact Name: Title: Phone: Email:	Description of Work Engagement:
Company Name: Contact Name: Title: Phone: Email:	Description of Work Engagement:

SUBCONTRACTORS

Identify authorized subcontractors who will provide service on a contract resulting from this solicitation.

LEGAL NAME	SMALL, WOMEN OWNED, VETERAN OR OTHER DISADVANTAGED STATUS	POINT OF CONTACT NAME	PHONE NUMBER	EMAIL ADDRESS

Return this Contractor's Profile & References to the RFP Coordinator at:
kathleen.sullivan@sos.wa.gov

Exhibit B

CONTRACT INCLUDING GENERAL TERMS AND CONDITIONS

[ATTACH]



Sample Contract
Main Section.pdf



Sample Contract
Exhibit A GT@C.pdf



Sample Contract
Exhibit B SOW.pdf



Sample Contract
Exhibit C Debarment



Exhibit
D_Trafficking.pdf

Exhibit C, Short appendix for Public Libraries Survey RFP, to help bidders build a demo (2).zip



FY 2023 PLS Edit
Check Changes_Final



FY 2023 PLS Import
Specs_Final.xlsx



FY 2023 PLS Users
Guide_508C.pdf



WAPublicLibrariesS
urveyRFP_Appendix(I



PLS FY 2023 Import
and Edit File Memo_I