



REQUEST FOR PROPOSALS (RFP)  
**RFP NO. 2023HCA28**

**NOTE:** *If you download this RFP from any source other than the Washington Electronic Business Solution (WEBS), you are responsible for registering in WEBS for your organization to receive any RFP amendments, including Bidder questions/agency answers. HCA is not responsible for any failure of your organization to register in WEBS or any other repercussions that may result to your organization because of this failure.*

**PROJECT TITLE:** Technical Assistance (TA), Training Services and Policy Support for Supported Employment and Supportive Housing Programs

**PROPOSAL DUE DATE:** March 21, 2024 by 2:00 p.m. *Pacific Time*, Olympia, Washington, USA.

Only e-mailed bids will be accepted.

**ESTIMATED TIME PERIOD FOR CONTRACT:** July 1, 2024 to June 30, 2025

The Health Care Authority reserves the right to extend the contract for up to three (3) additional one (1) year periods at its sole discretion, dependent on mutual agreement of the contract terms by the parties.

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

WEBS commodity codes included in procurement registration in WEBS include:

- 918-67, Human Services Consulting (To Include Mental Health Consulting Services), Consulting Services
- 952-55, Human Services, Homelessness Prevention Services
- 952-59, Human Services (Not Otherwise Classified), Human Services
- 952-62, Mental Health Services: Vocational, Residential, Etc., Human Services

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# 1. INTRODUCTION

## 1.1 DEFINITIONS

Definitions for the purposes of this RFP include:

**ACH** – Accountable Communities of Health

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

**ASB** or **Apparent Successful Bidder** – The Bidder selected as the entity to perform the anticipated services under this RFP, subject to completion of contract negotiations and execution of a written contract.

**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 set forth in this Solicitation and related documents.

**BH-ASO** or **Behavioral Health–Administrative Services Organization** – An entity that provides services that help clients navigate through mental health or substance use disorder (SUD) treatment services when needed. BH-ASOs are funded through state and federal block grant funding.

**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** – Individual or company interested in the RFP that submits a proposal to attain a contract with the Health Care Authority.

**Business Day** – Monday through Friday, 8:00 a.m. to 5:00 p.m., Pacific Time, except for holidays observed by the state of Washington, unless otherwise specified within the RFP.

**CoC** – Continuum of Care

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

**Contract** – A written agreement entered into between a successful Bidder or Bidders and HCA as a result of this Solicitation.

**Contract Extension Period** – A Contract performance period that follows the Initial Contract Period, as set forth in a signed Contract amendment.

**Coordinator or Solicitation Coordinator** – An individual or designee who is employed by HCA within the HCA Division of Legal Services, Office of Contracts and Procurement, and who is responsible for conducting this Solicitation.

**Debriefing** – a short meeting an Unsuccessful 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.

**DEI** – Diversity, Equity and Inclusion

**DSHS** – Department of Social and Health Services, an agency in the State of Washington.

**Employment First** – A national approach to align policies, regulatory guidance, and reimbursement structures to commit to employment as the priority option with respect to the use of publicly-financed day and employment services for youth and adults with significant disabilities. Many states have formally committed to the Employment First framework through official executive proclamation or formal legislative action (<https://www.dol.gov/agencies/odep/initiatives/employment-first>).

**FCS** – Foundational Community Supports

- HCA Website - <https://www.hca.wa.gov/about-hca/programs-and-initiatives/medicaid-transformation-project-mtp/initiative-3-foundational-community-supports-fcs>
- FCS Protocol - <https://www.hca.wa.gov/assets/program/mtd-fcs-protocol-approved.pdf>

**HCA or Health Care Authority** – An executive agency of the state of Washington that is issuing this RFP.

**Housing First** – Housing First is a homeless assistance approach that prioritizes providing permanent housing to people experiencing homelessness, thus ending their homelessness and serving as a platform from which they can pursue personal goals and improve their quality of life. This approach is guided by the belief that people need basic necessities like food and a place to live before attending to anything less critical, such as getting a job, budgeting properly, or attending to substance use issues. Additionally, Housing First is based on the understanding that client choice is valuable in housing selection and supportive service participation, and that exercising that choice is likely to make a client more successful in remaining housed and improving their life.

**IPS** – Individual Placements and Supports

**MCO** – Managed Care Organization

**MH** – Mental Health

**Procurement** – The broad process of identifying goods and services for purchase or acquisition, effectuating the purchase or acquisition, and 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 and Procurement are interchangeable.

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

**Proposal** – A formal offer submitted in response to this Solicitation. To be responsive, a Proposal must include all items outlined in Section 3 (PROPOSAL CONTENTS AND REQUIREMENTS). Two (2) such items that may be referred to throughout this document are:

- 1) Written Proposal – Bidder’s written response as described in Section 3.8 and Exhibit C.
- 2) Cost Proposal – Bidder’s cost as described in Section 3.9 and Exhibit D.

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

**RFP or Request for Proposals** – Formal solicitation document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the bidder community to suggest various approaches to meet the need at a given price.

**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.

**RCW or Revised Code of Washington** – The laws of the state of Washington, as enacted by the Legislature. Any references to specific titles, chapters, or sections of the RCW includes any substitute, successor, or replacement title, chapter, or section. Pertinent RCW chapters can be accessed at: <http://apps.leg.wa.gov/rcw/>.

### **RFP – Request for Proposal**

**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: (a) certifies, under penalty of perjury, that it is owned and operated independently from all other businesses and has either: (i) fifty or fewer employees; or (ii) a gross revenue of less than seven million dollars annually as reported on its federal income tax return or its return filed with the department of revenue over the previous three (3) consecutive years; or (b) is certified with the office of women and minority business enterprises under chapter 39.19 RCW.

**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 HCA in contracting to meet its needs. This RFP is a Solicitation.

**Solicitation Document** – This RFP 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 set forth in the Contract.

**Subcontractor** – A person, partnership, or entity not in the employment of or owned by the Bidder, who would be performing all or part of the services under this RFP under a separate contract with or on behalf of the Bidder. The term “Subcontractor” means Subcontractors in any tier.

**SUD** – Substance Use Disorder

**SE** – Supported Employment

**SH** – Supportive Housing

**PSH** – Permanent Supportive Housing

**TA** – Technical Assistance

TPA – Third Party Administrator

**Washington’s Electronic Business Solution or WEBS** – An internet-based bid notification system HCA uses to post competitive solicitations. Individuals and firms interested in state contracting opportunities with the Department of Enterprise Services or any state agency should [register](#) for ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES

Issue Request for Proposals	January 16, 2024
Pre-Proposal Conference	January 29, 2024 11:30 a.m. – 12:30 p.m. Pacific Time
Bidder Questions Due	February 5, 2024 2:00 p.m. Pacific Time
Interested Subcontractor Responses Due	February 12, 2024
HCA Answers Posted*	February 29, 2023
Interested Subcontractor List Posted*	March 7, 2024
Complaints Due (if applicable)	March 14, 2024
Proposals Due	March 21, 2024 2:00 p.m., Pacific Time
Evaluate Proposals*	March 28 – April 10, 2024
Conduct Oral Presentations with Finalists, if applicable	April 11-16, 2024
Meeting to review results and determine Apparent Successful Bidder (ASB)	April 17, 2024
Review of documentation by HCA Public Disclosure Team	April 18-24, 2024
Announce “Apparent Successful Bidder” via WEBS*	April 25, 2024
Debrief Request Deadline ( <i>3 Business Days after the ASB announcement</i> )	May 1, 2024
Negotiate Contract	May 2 – May 10, 2024
<b>CONTRACT EXECUTION DATE</b>	<b>May 20, 2024</b>
<b>PROGRAM START DATE AND CONTRACT START DATE</b>	<b>July 1, 2024</b>

\*Dates are anticipated and subject to change without an official amendment.

HCA reserves the right in its sole discretion to revise the above schedule at any time.

## 1.2 PURPOSE AND OBJECTIVES

The Washington State Health Care Authority, hereafter called “HCA,” is initiating this Request for Proposals (RFP) to solicit Proposals to identify up to three (3) vendors to provide TA, training and policy support services with respect to research-based, evidence-based and promising practices in the fields of SE and SH Services, and a lens for continuous quality improvement.

The target audiences for the services will include HCA staff, and may include staff, contractors and volunteers from any of the following:

- Other Washington State agencies, as relevant and appropriate;
- BH-ASOs;
- MCOs;
- Community behavioral health providers;
- FCS contracted providers or interested/potential providers;
- Peers, supervisors and leadership contracted by or interested in contracting with the Third Party Administrator designated by HCA to deliver high quality SE or SH services.

HCA intends to award up to three (3) contracts to provide the services within this RFP. Up to three (3) Contracts will be for TA and training services for Supported Employment and Supportive Housing Programs, and one (1) Contract may either have a policy support component or will have a sole focus of policy support. The Contract for policy support may be combined with one (1) of the TA and training services Contract, if the Contractor experience, expertise and availability makes them eligible to provide both services.

## 1.1 WORK ORDER PROCESS

Upon executed Contract(s) with selected vendor(s), HCA will issue work projects in the form of a Work Order (WO) under the awarded Contract with the vendor(s), in accordance with the Work Order template provided in Exhibit B, Draft Contract. In coordination with the selected vendor(s), HCA will establish a work order request and a vendor response template for all WOs. The vendor(s) and HCA will agree upon timeframes and responsibilities as they relate to the establishing of new WOs. WOs will consist of a SOW, deliverables, timeframes, and effort/cost related to the work, and must be approved by authorized representatives of each party prior to work commencing. Rates will be in accordance with Exhibit D, Cost Proposal.

## 1.2 BACKGROUND

In 2017, the state of Washington entered into an agreement with the federal government to permit modifications to federal Medicaid program requirements to test new approaches in the state of Washington to providing health care and coverage with a goal of paying for value rather than volume. The “Medicaid Transformation Waiver” agreement provided for several initiatives, one of which is in support of the Foundational Community Supports (FCS) program. HCA and Medicaid [Renewed MTP](#) for an additional five (5) years, beginning on July 1, 2023. By renewing MTP, our state can continue to develop innovative projects, activities, and services that improve Apple Health (Medicaid).

This Solicitation seeks contractors to provide expert level TA, training, and policy development to continue expansion efforts with the Foundational Community supports initiative. This initiative addresses social determinants of health by providing targeted supported employment and supportive housing services to high-risk Medicaid recipients.



## 1.3 SCOPE OF WORK

### 1. Potential\* TA and Training Topics

*\*Note: Contracts may not contain all service requirements listed in this Scope of Work.*

#### 1.1. Supportive Housing

- 1.1.1. Principles of Permanent Supportive Housing;
- 1.1.2. Fidelity to PSH fidelity review facilitation;
- 1.1.3. Housing First and Harm Reduction;
- 1.1.4. Cultural, including work with tribal communities;
- 1.1.5. Fair housing;
- 1.1.6. Documenting medically necessary services with a Medicaid lens;
- 1.1.7. Developing landlord relationships;
- 1.1.8. Sustainability efforts and return on investments in SH;
- 1.1.9. Writing policies and procedures to meet fidelity to EBPs for PSH;
- 1.1.10. Types of housing/subsidies – Section 8, project-based, HUD 811 projects;
- 1.1.11. Coordinated entry and wording with CoCs;
- 1.1.12. Serving the chronically homeless;
- 1.1.13. Reasonable accommodations in housing, including service or companion animals;
- 1.1.14. Oxford Housing program;
- 1.1.15. Working with payee services;
- 1.1.16. Teaching financial literacy skills;
- 1.1.17. Job descriptions and hiring practices for housing specialists;
- 1.1.18. Servicing individuals with justice system involvement;
- 1.1.19. Recordkeeping and documentation standards;
- 1.1.20. Serving Individuals with behavioral health, SUD, and/or co-occurring conditions;
- 1.1.21. PSH supervisor roles and responsibilities;
- 1.1.22. Care coordination between SH services, housing providers and other systems of care;
- 1.1.23. Other topics, as agreed to by HCA and Contractor, provided they fit within the scope of the FCS Protocol.

- 1.2. Supported Employment
  - 1.2.1. Principles of IPS;
  - 1.2.2. Fidelity to IPS – Fidelity review facilitation;
  - 1.2.3. Building your program;
  - 1.2.4. Employment First:
    - 1.2.4.1. Meeting individuals where they are;
    - 1.2.4.2. Individuals with SUD;
    - 1.2.4.3. Individuals with BH issues;
    - 1.2.4.4. Youth in transition; and/or
    - 1.2.4.5. Cultural – tribal communities.
  - 1.2.5. Documenting Medically-necessary SE Services;
  - 1.2.6. Job Development, Employer Relations;
  - 1.2.7. Sustainability and the business case/ROI for SE services;
  - 1.2.8. Writing Policies and Procedures to meet Fidelity to Evidence-based Practice IPS SE;
  - 1.2.9. Types of employment supports and follow-up services;
  - 1.2.10. Care coordination between SE services, Employment Systems (Division of Vocational Rehabilitation, Worksource, Workfirst) and other systems of care;
  - 1.2.11. Serving individuals with justice system involvement;
  - 1.2.12. Employment services and the homeless population (e.g., Housing Essential Needs);
  - 1.2.13. Reasonable accommodations in employment;
  - 1.2.14. Supported education;
  - 1.2.15. Teaching financial literacy skills;
  - 1.2.16. Benefits planning;
  - 1.2.17. Integration of IPS and BH or other systems of care;
  - 1.2.18. Collaboration with DSHS Division of Vocational Rehabilitation (DVR);
  - 1.2.19. Creating/developing IPS steering committees;
  - 1.2.20. Recordkeeping and documentation standards;
  - 1.2.21. IPS supervisor role and responsibilities;
  - 1.2.22. Collaboration with WorkSource partners, Workforce Innovation and Opportunity Act and other opportunities (Pipeline, ABLE accounts);
  - 1.2.23. Helping people consider employment – Addressing myths, disincentives and other misperceptions;
  - 1.2.24. How/when to disclose;

- 1.2.25. Job descriptions and hiring practices for employment specialists;
- 1.2.26. Other topics, as agreed to by HCA and Contractor, provided they fit within the scope of the FCS Protocol.

2. Potential\* Service Delivery Training Methods

*\*Note: Contracts may not contain all service requirements listed in this Scope of Work.*

- 2.1. In-person or virtual training and consultation;
- 2.2. Webinars;
- 2.3. Conferences;
- 2.4. Workshops;
- 2.5. Educational Materials;
- 2.6. Other topics, as agreed to by HCA and Contractor, provided they fit within the scope of the FCS Protocol.

3. Potential\* Service Delivery – TA Methods

*\*Note: Contracts may not contain all service requirements listed in this Scope of Work.*

- 3.1. Workforce development.
  - 3.1.1. Increasing staff skills on the topics;
  - 3.1.2. Documenting.
- 3.2. Consultation to providers to implement the services/build capacity.
  - 3.2.1. Implementing peer support/career pathways for peers;
  - 3.2.2. Developing infrastructure (policies and procedures) to deliver services;
  - 3.2.3. Continuous quality improvement (fidelity);
  - 3.2.4. Balancing financial risk with implementing the service.
- 3.3. Consultation to MCOs, HCA, ACHs, ASOs, BH-ASOs - Research behind the models.
- 3.4. Business case materials to sustain the services, including capturing success stories.
- 3.5. Stakeholder engagement and training.
  - 3.5.1. Operationalize referrals/streamline processes;
  - 3.5.2. Strengthen partnerships;
  - 3.5.3. Create more opportunities for warm handoffs.
- 3.6. Train the trainers - Assist state trainers with curriculum/training activities.
- 3.7. Materials.
  - 3.7.1. Marketing the program;
  - 3.7.2. Forms.
- 3.8. Cultural competency.

- 3.8.1. Consultations with tribal communities and providers who serve tribal communities;
  - 3.8.2. Disparate populations;
  - 3.8.3. Rural and urban needs;
  - 3.8.4. Strategies.
- 3.9. Other topics, as agreed to by HCA and Contractor, provided they fit within the scope of the FCS Protocol.
4. Potential\* TA Strategies.

*\*Note: Contracts may not contain all service requirements listed in this Scope of Work.*

The strategies for delivery of TA shall include, but shall not be limited to:

- 4.1. Workforce development.
  - 4.1.1. Increasing staff skills on the topics;
  - 4.1.2. Documenting.
- 4.2. Consultation to providers to implement the services/build capacity.
  - 4.2.1. Implementing peer support/career pathways for peers;
  - 4.2.2. Developing infrastructure to deliver services (e.g. policies and procedures - P&Ps);
  - 4.2.3. Continuous quality improvement (fidelity);
  - 4.2.4. Balancing financial risk with implementing the service.
- 4.3. Consultation to MCOs, HCA, ACHs, BH-ASOs: Research behind the models.
- 4.4. Business case materials to sustain the services, including capturing success stories.
- 4.5. Stakeholder engagement and training.
  - 4.5.1. Operationalize referrals/streamline processes;
  - 4.5.2. Strengthen partnerships;
  - 4.5.3. Create more opportunities for warm handoffs.
- 4.6. Train the trainers, including assisting state trainers with curriculum/training activities.
- 4.7. Materials.
  - 4.7.1. Marketing the program;
  - 4.7.2. Forms.
- 4.8. Diversity, Equity and Inclusion (DEI).
  - 4.8.1. Consultations with members of tribal communities and providers who serve tribal communities;
  - 4.8.2. Disparate populations.
- 4.9. Rural and urban needs.
- 4.10. Other topics, as agreed to by HCA and Contractor, provided they fit within the scope of the FCS Protocol.

5. Potential\* Policy Development and Legislative Support work.

*\*Note: Contracts may not contain all service requirements listed in this Scope of Work.*

- 5.1. Drafting new modified language;
- 5.2. Bill/policy/statute analysis and interpretations;
- 5.3. Drafting reports;
- 5.4. Testimony prep;
- 5.5. General policy development advocacy;
- 5.6. General legislative advocacy;
- 5.7. Stakeholder communications;
- 5.8. Assessing strengths, weaknesses, opportunities, challenges;
- 5.9. Other topics, as agreed to by HCA and Contractor, provided they fit within the scope of the FCS Protocol.

#### **1.4 MINIMUM QUALIFICATIONS**

The following are the minimum qualifications for Bidders:

- A. Licensed to do business in the state of Washington or provide a commitment that it will become licensed in Washington within 30 calendar days of being selected as the Apparent Successful Bidder.

AND

BOTH B and C

- B. Experience providing TA to entities, governments, and quasi-government agencies, and providers for the implementation of Supportive Housing programs, AND
- C. Experience providing TA to entities, governments, and quasi-government agencies, and providers for the implementation of Supported Employment programs.

OR instead of B and C:

- D. Experience with facilitating implementation or ongoing support of at least three (3) of the following program areas:
  - Medicaid (or comparable experience)
  - Homelessness
  - Affordable housing (Olmstead Law)
  - Supported employment
  - Behavioral health
  - Substance use disorders
  - Community integration
  - DEI
  - Policy development

For example:

- 1. Minimum Qualifications require A, B and C.
- 2. Minimum Qualifications require A and D.

## **1.5 FUNDING**

HCA has budgeted a total amount of One Hundred Forty-Four Thousand Three Hundred Thirty-Three Dollars (\$144,333.00) for each of the three (3) Contract awards, for an aggregate total not to exceed Four Hundred Thirty-Two Thousand Nine Hundred and Ninety-Nine Dollars (\$432,999.00) for the sum of all three (3) Contracts for the Services to be provided during the Initial Contract Period.

HCA may lesser amounts to each Contractor during the Initial Contract Period or any Contract Extension Period, and reserves the right to increase or decrease the maximum amount of any Contract based upon its anticipated utilization of each Contractor during the applicable Contract Period,.

Any contract awarded as a result of this Solicitation is contingent upon the availability of funding.

The amount of funding available for each Contract Extension Period will be determined by the Washington legislature, and could possibly exceed the original contract amount.

## **1.6 PERIOD OF PERFORMANCE, NATURE OF CONTRACTS**

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about July 1, 2024 and to end on June 30, 2025. Amendments extending the period of performance, if any, will be at the sole discretion of HCA.

HCA intends to enter into up to three (3) Contracts that will engage contractors who will provide Services within their availability and specific areas of expertise pursuant to Work Orders.

Each Contract will have an estimated initial contract period of July 1, 2024 through June 30, 2025. The contract(s) may, in HCA's sole discretion, be amended to extend them for up to three (3) successive one (1) year Contract Extension Periods, through June 30, 2028, and to add or adjust funding pertaining to Services to be provided during the Initial Contract Period and for the applicable Contract Extension Periods.

All Services to be provided under each of the Contracts will be set forth with Work Orders identifying specific deliverables, performance measures, performance timelines and amounts payable. Each Work Order will be executed and incorporated into the terms of its associated Contract.

Although some services may be provided through in-person meetings or trainings, webinars, and telephonic or videoconferencing methods, at least some of the Services must be provided within the state of Washington. Additional Services that are appropriate to the scope of this Solicitation, as determined by the State, may be added to the Contract in a mutually agreeable amendment.

## **1.7 ADA**

HCA complies with the Americans with Disabilities Act (ADA). Bidders may contact the RFP Coordinator to receive written information in another format (e.g., large print, audio, accessible electronic formats, and other formats).

## 2. GENERAL INFORMATION FOR BIDDERS

### 2.1 RFP COORDINATOR

The RFP Coordinator is the sole point of contact in HCA for this Solicitation. All communication between the Bidder and HCA upon release of this RFP must be with the RFP Coordinator, as follows:

Name	Heidi Jones
E-Mail Address	<a href="mailto:HCAProcurements@hca.wa.gov">HCAProcurements@hca.wa.gov</a>

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

### 2.2 PRE-PROPOSAL CONFERENCE

A pre-proposal conference is scheduled to be held on Wednesday, **January 29, 2024 at 11:30 a.m., Pacific Time** via a video-conferencing tool at HCA's discretion. All prospective Bidders should attend; however, attendance is not mandatory. An agenda containing meeting details will be posted as an amendment to this Solicitation.

[Link to Pre-Proposal Conference](#)

HCA will be bound only to HCA written answers to questions. Questions arising at the pre-proposal conference or in subsequent communication with the RFP Coordinator will be documented and answered in written form. A copy of the questions and answers will be posted on WEBS as an Amendment to this RFP.

### 2.3 INTERESTED SUBCONTRACTOR LIST

HCA supports and encourages contracts and subcontracts with small, diverse, and veteran-owned businesses. To support participation in this process, the RFP Coordinator will add a list of Interested Subcontractors to the RFP. The RFP Coordinator will prepare the List based on the timely and complete submission of specific information requested in this section. The purpose of the List is to communicate to prime bidders the capabilities of interested subcontractors who can perform components of this RFP's Scope of Work.

#### A. Interested Subcontractor Instructions

- i. Failure to follow the instructions in this Section may prevent your information from being included in the List.
- ii. An interested party must complete the below table to submit their firm name, contact information, and the summary of their capabilities as they relate to this RFP's Scope of Work. Submissions are limited to what is requested in the table below and capability summaries must be two (2) paragraphs or less.
- iii. The RFP Coordinator will only include the information requested below. Do not submit marketing materials.

- iv. Submissions must be emailed to the RFP Coordinator, with the subject line “RFP # Interested Subcontractor List – [Interested Subcontractor Name]” by the date specified in Section 1.2 (ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES).
- v. All material submitted for the Interested Subcontractor List becomes a public record.

Interested Subcontract Name	Contact Name	Contact Address, Phone Number, and Email Address	Summary of your capabilities as it relates to the Scope of Work

**B. Posting Date**

Complete and timely submissions will be compiled and posted in alphabetical order by interested subcontractor name. HCA anticipates the List will be posted as an RFP amendment on the *Interested Subcontractor List Posted* date identified in Section 1.2 (ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES). Late submissions will not be posted.

**C. Information Provided As-Is**

The Interested Subcontractor List is provided as an opportunity to support participation in this RFP. HCA provides this information as a courtesy with no warranties or representations as to any party and no guarantee of a subcontract. The Interested Subcontractor List shall not be construed as an endorsement by the state of Washington or HCA. The interested party is responsible for the completeness and accuracy of their submission.

**2.4 BIDDER QUESTIONS PERIOD**

Bidders are provided an opportunity to ask questions during the bidder question period which starts on the date of the RFP posting and concludes on the *Questions Due* date specified in Section 1.2 (ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES).

- A. Questions regarding the RFP will only be accepted in writing, sent by email to the RFP Coordinator. The Bidder must use the following email subject line when submitting questions: “RFP # Question(s) – [Bidder Name]” to ensure timely receipt.
- B. HCA anticipates it will post answers to the questions in WEBS as an RFP amendment on the *Answers Posted* date specified in Section 1.2 (ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES).
- C. HCA is under no obligation to respond to any questions received after the *Questions Due date* but may do so at its discretion.



## **2.5 SUBMISSION OF PROPOSALS**

Proposals must be received by the RFP Coordinator no later than the *Proposal Due* deadline in Section 1.2, (ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES). Proposals must be submitted electronically as an attachment to an e-mail to the RFP Coordinator at the e-mail address listed in Section 2.1, and meet the following requirements:

- A. Attachments to e-mail must be in Microsoft Word format or PDF.
- B. The Cost Proposal must be submitted as a separate attachment.
- C. Zipped files cannot be received by HCA and cannot be used for submission of proposals.
- D. The forms and certifications that require authorized signature (as designated in section 3.1, PROPOSAL CONTENTS OVERVIEW) must have a signature of the individual within the organization authorized to bind the Bidder to the offer.
- E. HCA does not assume responsibility for problems with Bidder's e-mail. If HCA e-mail is not working, appropriate allowances will be made.

Bidders should allow sufficient time to ensure timely receipt of the proposal by the RFP Coordinator. Late proposals will not be accepted and will be automatically disqualified from further consideration, unless HCA e-mail is found to be at fault or HCA deems a grace period is in the best interest of the State. All proposals and any accompanying documentation become the property of HCA and will not be returned.

## **2.6 PROPRIETARY INFORMATION / PUBLIC DISCLOSURE**

Proposals submitted in response to this RFP will become the property of HCA. All proposals received will remain confidential until the Apparent Successful Bidder is announced; thereafter, the proposals will be deemed public records as defined in chapter 42.56 of the Revised Code of Washington (RCW).

Any information in the proposal that the Bidder desires to claim as proprietary and exempt from disclosure under chapter 42.56 RCW, or other state or federal law that provides for the nondisclosure of a document, must be clearly designated. Each page claimed to be exempt from disclosure must be clearly identified and must reference either: (1) the specific basis claimed under 42.56 RCW, or (2) a statement of why the information is designated propriety. Each page containing the information claimed to be exempt from disclosure must be clearly identified by the words "Proprietary Information" printed on the lower right-hand corner of the page. Marking the entire proposal exempt from disclosure or as Proprietary Information will not be honored.

If a public records request is made for the information that the Bidder has marked as "Proprietary Information," HCA will notify the Bidder of the request and of the date that the records will be released to the requester unless the Bidder obtains a court order enjoining that disclosure. If the Bidder fails to obtain the court order enjoining disclosure, HCA will release the requested information on the date specified. If a Bidder obtains a court order from a court of competent jurisdiction enjoining disclosure pursuant to chapter 42.56 RCW, or other state or federal law that provides for nondisclosure, HCA will maintain the confidentiality of the Bidder's information per the court order.

A charge will be made for copying and shipping, as outlined in RCW 42.56. No fee will be charged for inspection of contract files, but 24 hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

The submission of any public records request to HCA pertaining in any way to this RFP will not affect the solicitation schedule, as outlined in Section 1.2, unless HCA, in its sole discretion, determines that altering the schedule would be in HCA's best interests.

## 2.7 REVISIONS TO THE RFP

If HCA determines in its sole discretion that it is necessary to revise any part of this RFP, then HCA will publish addenda on WEBS. For this purpose, the published questions and answers and any other pertinent information will be provided as an addendum to the RFP and will be published on WEBS.

HCA also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

## 2.8 COMPLAINT PROCESS

The complaint process allows potential Bidders to focus on the solicitation requirements and evaluation process and raise issues early enough in the process to allow HCA to correct a problem before proposals are submitted. The complaint period starts on the date of the RFP posting and concludes on the *Complaints Due* date identified in Section 1.2 (ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES).

- A. Potential Bidders may submit a complaint to HCA based on any of the following:
  - i. The RFP unnecessarily restricts competition;
  - ii. The RFP evaluation or scoring process is unfair or unclear; or
  - iii. The RFP requirements are inadequate or insufficient to prepare a response.
- B. For a complaint to be considered, it must be received by HCA by 5:00 pm PT on the *Complaints Due* date identified in Section 1.2. The complaint must:
  - i. Be in writing;
  - ii. Be sent to the RFP Coordinator, or designee;
  - iii. Clearly articulate the basis for the complaint; and
  - iv. Include a proposed remedy.
- C. HCA will address any complaint as follows:
  - i. The RFP Coordinator, or designee will respond to the complaint in writing.
  - ii. The response to the complaint and any changes to the RFP will be posted on WEBS.
  - iii. The Director of HCA will be notified of all complaints and will be provided a copy of HCA's response.

Complaints may not be raised again during a protest and HCA's action or inaction in response to a complaint will be final. There is no appeal process.

## **2.9 RESPONSIVENESS**

The RFP Coordinator will review all proposals to determine compliance with administrative requirements and instructions specified in this RFP. A Bidder's failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

HCA also reserves the right at its sole discretion to waive minor administrative irregularities.

## **2.10 MOST FAVORABLE TERMS**

HCA reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the Bidder can propose. HCA reserves the right to contact a Bidder for clarification of its proposal.

The ASB should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. The contract resulting from this RFP will incorporate some, or all, of the Bidder's proposal. The proposal will become a part of the official solicitation file on this matter without obligation to HCA.

## **2.11 RECEIPT OF INSUFFICIENT NUMBER OF PROPOSALS**

If HCA receives only one responsive proposal as a result of this RFP, HCA reserves the right to either: 1) directly negotiate and contract with the Bidder; or 2) not award any contract at all. HCA may continue to have the bidder complete the entire RFP. HCA is under no obligation to tell the Bidder if it is the only Bidder.

## **2.12 NO OBLIGATION TO CONTRACT**

This RFP does not obligate HCA to enter into any contract for services specified herein.

## **2.13 REJECTION OF PROPOSALS**

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

## **2.14 SUBCONTRACTOR PARTICIPATION MONITORING AND REPORTING**

Pursuant to Executive Order 22-01, Equity in Public Contracting (dated 01/07/2022), Bidders using Subcontractors for any part of this work will be subject to the requirements of this section if awarded a contract as a result of this solicitation.

Once a contract is awarded through the solicitation process, the awarded Contractor is obligated to complete a new vendor registration in Access Equity. Access Equity (B2Gnow) is a secure business diversity management system available online at <https://omwbe.diversitycompliance.com/>.

Confidential Information (e.g., Tax ID, etc.) will not be published in Access Equity. Contractors that have previously registered with B2Gnow for any public entity, must verify and ensure that Access Equity contains their most up-to-date registration information. Contractors can navigate online to Access Equity at <https://omwbe.diversitycompliance.com/> or through a direct link on the Office of Minority and Women's Business Enterprises (OMWBE) website at: <https://omwbe.wa.gov/>.

During the contract term, the Contractor will report monthly payments to all relevant Subcontractors in Access Equity. Monthly reporting information includes total dollar payments made to relevant Subcontractors, payment dates, and any additional information required to verify payment to Subcontractors. The Contractor will enter this payment information into Access Equity, and the Subcontractors will verify this payment information in the system. This requirement applies to both Contractors and Subcontractors. Online training is available through Access Equity.

### 3. PROPOSAL CONTENTS AND REQUIREMENTS

#### 3.1 PROPOSAL CONTENTS OVERVIEW

Proposals must be submitted per the instructions in Sections 2.5 (SUBMISSION OF PROPOSALS) and 3.2 (PROPOSAL REQUIREMENTS AND GUIDELINES) in the order noted below.

A. Bidder Forms and Certifications (Exhibit A)

All the following are included in Exhibit A:

- i. Bidder Profile & Submittal Form\* (Section 3.3 and Exhibit A, Section A)
- ii. Diverse Business Inclusion Plan (Section 3.4 and Exhibit A, Section B)
- iii. Executive Order 18-03 Worker's Rights\* (Section 3.5 and Exhibit A, Section C)
- iv. References (Section 3.6 and Exhibit A, Section D)

B. Draft Contract (Section 3.7 and Exhibit B)

C. Written Proposal (Section 3.8 and Exhibit C)

D. Cost Proposal (Section 3.9 and Exhibit D)

Please do not include any marketing materials (e.g., brochures), as they are not considered as part of the evaluation process and have no impact on scoring. Bids that include marketing materials in lieu of answering questions will be excluded from the review process.

*\*Authorized signature required*

#### 3.2 PROPOSAL REQUIREMENTS AND GUIDELINES

Proposals must comply with the requirements or restrictions listed below. Failure to do so may result in the disqualification of the Bidder's Proposal:

- A. State the Bidder's full legal name on the first or cover page of the Proposal.
- B. Proposals must provide information in the same order as presented in this RFP and with the same headings. Title and number each item in the same way it appears in the RFP. Each question must be restated prior to the Bidder's response.
- C. **All items listed in Section 3.1 (PROPOSAL CONTENTS OVERVIEW) must be included as part of the Proposal for the Proposal to be considered responsive;** however, only the following items will be scored during the evaluation process: Executive Order 18-03 Worker's Rights, Written Proposal, and Cost Proposal.
- D. Bidders are liable for all errors or omissions contained in their Proposals. Bidders will not be allowed to alter Proposal documents after the deadline for Proposal submission. HCA is not liable for any errors in Proposals.

HCA is under no obligation to consider any supplemental materials submitted that were not requested.

### **3.3 BIDDER PROFILE & SUBMITTAL FORM (MANDATORY, NOT SCORED)**

Exhibit A, Bidder Forms and Certifications, Section A, Bidder Profile & Submittal Form must be completed in its entirety and signed and dated by a person authorized to legally bind the Bidder to a contractual relationship (e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship).

### **3.4 DIVERSE BUSINESS INCLUSION PLAN (MANDATORY, NOT SCORED)**

Exhibit A, Bidder Forms and Certifications, Section B, Diverse Business Inclusion Plan must be completed in its entirety. In accordance with legislative findings and policies set forth in RCW 39.19 the state of Washington encourages participation in all contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE), set forth in RCW 43.60A.200 for firms certified by the Washington State Department of Veterans Affairs, and set forth in RCW 39.26.005 for firms that are Washington Small Businesses. Participation may be either on a direct basis or on a Subcontractor basis. However, no preference on the basis of participation is included in the evaluation of Diverse Business Inclusion Plans submitted, and no minimum level of minority- and women-owned business enterprise, Washington Small Business, or Washington State certified Veteran Business participation is required as a condition for receiving an award. Any affirmative action requirements set forth in any federal governmental regulations included or referenced in the contract documents will apply.

### **3.5 EXECUTIVE ORDER 18-03 (MANDATORY, SCORED)**

Bidder must review Exhibit A, Bidder Forms and Certifications, Section C and respond as to whether the Bidder requires its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses and class or collective action waivers.

### **3.6 REFERENCES (MANDATORY, NOT SCORED)**

Provide three (3) business references for the Bidder using the reference forms provided in Exhibit A, Bidder Forms and Certifications, Section D, References. References must be independent of the Bidder's and Subcontractor's company corporation (e.g., non-Bidder owned, in whole or in part, or managed, in whole or in part) and be for work similar to the scope of work contained herein. Complete all boxes of the reference form for each reference. By submitting a proposal in response to this Solicitation, the Bidder and team members grant permission to HCA to contact these references and others, who from HCA's perspective, may have pertinent information. At HCA's sole discretion, HCA may or may not choose to contact references.

### **3.7 DRAFT CONTRACT (OPTIONAL, NOT SCORED)**

The ASB will be expected to enter into a contract which is substantially the same as the sample contract and its general terms and conditions attached as Exhibit B. HCA will not accept any draft contracts prepared by any Bidder. The Bidder must be prepared to agree to all terms of the attached Exhibit B, Draft Contract, as presented or the Proposal may be rejected. If Bidder has exceptions to the terms and conditions, they must include with their Proposal a copy of the Draft Contract with redline edits/comments documenting the changes they propose to be made if selected as ASB. If the Bidder fails to identify an objection to any particular term or condition, the term or condition will be deemed agreed to by the Bidder. HCA will review requested exceptions and accept or reject the same at its sole discretion.

If, after the announcement of the ASB, and after a reasonable period of time, the ASB and HCA cannot reach agreement on acceptable terms for the Contract, the HCA may cancel the selection and Award the Contract to the next most qualified Bidder.

### **3.8 WRITTEN PROPOSAL (MANDATORY, SCORED)**

Exhibit C, Written Proposal must be completed in its entirety in accordance with the page limits identified within the Exhibit (See Section 3.2(E)). Bidder should respond using Exhibit C as its template, to ensure compliance with the formatting requirements outlined in Section 3.2(B).

### **3.9 COST PROPOSAL (MANDATORY, SCORED)**

*(Maximum available points: 210)*

The maximum cost proposed for each of the three (3) proposals must total One Hundred Forty-Four Thousand Three Hundred Thirty-Three Dollars (\$144,333.00) or less to be considered responsive to this RFP.

The evaluation process is designed to award this Solicitation not necessarily to the Bidder of least cost, but rather to the Bidder whose proposal best meets the requirements of this RFP. However, Bidders are encouraged to submit proposals which are consistent with state government efforts to conserve state resources.

#### **A. Identification of Costs**

- i. Identify all costs in U.S. dollars including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Bidder is to submit a fully detailed budget including staff costs, estimates for any applicable sales and use taxes (see 3.A(ii) below), and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract.
- ii. ASB(s) will be required to collect Washington state sales and use taxes from HCA, as applicable, and for remittance of payment to the Washington State Department of Revenue (DOR). Bidders must identify any expenses to which Washington State sales and use taxes apply in the Cost Proposal and include an estimated amount for such taxes (based on the current tax rate(s)). HCA understands these amounts may fluctuate as tax rates fluctuate. If a tax isn't specifically identified, HCA will assume it is included in the costs identified.

#### **B. Cost Proposal**

- i. Bidder must provide the Cost Proposal as a separate attachment, using the Exhibit D, Cost Proposal Excel spreadsheet format.
- ii. While the numbers proposed are estimates, Bidder is committing that they have the capacity to perform as estimated. Cost Proposal will be scored based on the rates per hour and/or event.
- iii. Use whole numbers, no decimals.
- iv. If you do not plan on bidding for services in a specific category, enter zeroes (0's) or leave blank.
- v. Bidders may add up to five (5) additional lines for each category (e.g., two TA rates, enter one rate and estimated hours per row).
- vi. Below is an example of what the Cost Proposal will look like. Bidders must provide the Cost Proposal using the Exhibit D, Cost Proposal spreadsheet format.

- vii. Hourly Rate - Enter your hourly rate and estimated hours you have capacity and willingness to provide services.
- viii. Event Rate - Enter your per-event rate and the number of events you have capacity and willingness to provide services for.
- ix. Make sure cells with formulas reflect correct sum totals.

#	Description	Hourly Rate			Event Rate			Maximum Compensation
		Rate per hr	Est # of hrs	Total cost est for hrs worked	Rate per event	Est # of events	Total cost est for events	
<i>Example: Webinar</i>					\$50	1	\$50	\$50
<i>Example: Technical Assistance</i>		\$50	10	\$500				\$500
<b>Events</b>								
1	SE Webinar						\$	\$
2	SH Webinar						\$	\$
3	Policy Webinar						\$	\$
Subtotal, Events							\$	\$
<b>Technical Assistance</b>								
4	SE Technical Assistance			\$				\$
5	SH Technical Assistance			\$				\$
6	Policy Technical Assistance			\$				\$
Subtotal, Technical Assistance				\$				\$
Totals				\$				\$



## 4. EVALUATION AND CONTRACT AWARD

### 4.1 EVALUATION PROCEDURE

Responsive Proposals will be evaluated strictly in accordance with the requirements stated in this RFP and any addenda issued. The evaluation of proposals will be accomplished by an evaluation team, to be designated by HCA, which will determine the ranking of the proposals. Evaluation teams could be comprised of internal (HCA) and external individuals. Evaluations will only be based upon information provided in the Bidder's Proposal.

- A. All proposals received by the stated deadline in Section 1.2 (ESTIMATED SCHEDULE OF SOLICITATION ACTIVITIES) will be reviewed by the RFP Coordinator to ensure that they contain all of the required information requested in the RFP. Only responsive proposals that meet the requirements will be evaluated by the evaluation team. Any Bidder who does not meet the stated qualifications or any proposal that does not contain all the required information will be rejected as non-responsive.
- B. HCA may, at its sole discretion, waive minor administrative irregularities.
- C. The RFP Coordinator may, at their sole discretion, contact the Bidder for clarification of any portion of the Bidder's Proposal. Bidders should take every precaution to ensure that all answers are clear, complete, and directly address the specific requirement.
- D. Responsive Written Proposals will be reviewed and scored by an evaluation team using the weighted scoring system described in Section 4.2 (EVALUATION WEIGHTING AND SCORING). Written Proposals will be evaluated strictly in accordance with the requirements set forth in this RFP and any addenda issued.
- E. The evaluation of the Cost Proposal and Executive Order 18-03 will be completed by the RFP Coordinator.
- F. HCA, at its sole discretion, may elect to select finalists for an oral presentation, and will consider the results in the overall score.
- G. HCA reserves the right to award the contract to the Bidder whose proposal is deemed to be in the best interest of HCA and the state of Washington.

### 4.2 EVALUATION WEIGHTING AND SCORING

Bidders' final scores will be based on the following scored items: Executive Order 18-03, Written Proposal, Cost Proposal, and, if applicable, Oral Presentations.

- A. Executive Order 18-03

Pursuant to RCW 39.26.160(3) and consistent with Executive Order 18-03 – Supporting Workers' Rights to Effectively Address Workplace Violations (dated June 12, 2018), HCA will evaluate proposals for best value and provide a preference in the amount of 50 points to any Bidder who certifies, pursuant to the certification included in Exhibit A, Bidder Forms and Certifications, Section C, 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 waiver. Bidders that do require their employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waiver will not be disqualified from evaluation of this RFP, however they will receive 0 out of 50 points for this section.

B. Scoring of Written Proposal

Each question in Exhibit C, Written Proposal has been assigned a weight. Points will be assigned to each question based upon the average of all evaluation team members scores for the question (0-10) multiplied by the weight indicated below. Individual question scores will then be combined to result in the Bidder's total weighted score. Any point calculations that result in decimal points will be rounded to the nearest whole number. The weight and maximum points for each question are as outlined in the following Evaluation Table:

<b>Evaluation Table</b>		
<b>Section Title</b>	<b>Weight</b>	<b>Maximum Points</b>
Section 1, Bidder Qualification and Experience (Management Response)	5	900
Section 2, Bidder's Solution and Proposed Approach (Technical Response)	4	280
<b>Written Proposal Maximum Points</b>		<b>1,180</b>

C. Scoring Rubric for Written Proposal

Evaluators will score the sections outlined in the Evaluation Table above using the following (0-10) scoring rubric:

<b>Scoring Rubric</b>		
<b>Score</b>	<b>Description</b>	<b>Scoring Criteria</b>
10	Far Exceeds Requirements	The Bidder has provided an innovative, detailed, and thorough response to the requirement, and clearly demonstrates a high level of experience with, or understanding of the requirement.
7	Exceeds Requirements	The Bidder has demonstrated an above-average capability, approach, or solution and has provided a complete description of the capability, approach, or solution.
5	Meets Requirements	The Bidder has an acceptable capability of solution to meet this criterion and has described its approach in sufficient detail to be considered "as substantially meeting the requirements".
3	Below Requirements	The Bidder has established some capability to perform the requirement but descriptions regarding their approach are not sufficient to demonstrate the Bidder will be fully able to meet the requirements.
1	Substantially Below Requirements	The Bidder has not established the capability to perform the requirement, has marginally described its approach, or has simply restated the requirement.
0	No Value	The Bidder does not address any component of the requirement, or no information was provided.

D. Scoring of Cost Proposal

The cost elements listed in Exhibit D, Cost Proposal, will be scored based on each service topic and the best value of all services included placed in rank order, with the highest scores going to Applicants that provide the most services for the cost. For the purpose of this best value determination, quality is assumed as equal among all Applicants.

Service Topic	Value Ranking	Score
SE Webinars and Technical Assistance	Highest	70
	2 <sup>nd</sup>	60
	3 <sup>rd</sup>	50
	4 <sup>th</sup>	40
	5 <sup>th</sup>	30
	6 <sup>th</sup>	20
	7 <sup>th</sup>	10
	8 <sup>th</sup> and lower	0
SH Webinars and Technical Assistance	Highest	70
	2 <sup>nd</sup>	60
	3 <sup>rd</sup>	50
	4 <sup>th</sup>	40
	5 <sup>th</sup>	30
	6 <sup>th</sup>	20
	7 <sup>th</sup>	10
	8 <sup>th</sup> and lower	0
Policy Webinars and Technical Assistance	Highest	70
	2 <sup>nd</sup>	60
	3 <sup>rd</sup>	50
	4 <sup>th</sup>	40
	5 <sup>th</sup>	30
	6 <sup>th</sup>	20
	7 <sup>th</sup>	10
	8 <sup>th</sup> and lower	0

E. Oral Presentations

HCA may after evaluating the Written Proposals elect to schedule oral presentations of the Bidders who scored highest on the Written Proposal (finalists). Should oral presentations become necessary, HCA will contact the finalists to provide further details and schedule the presentations. Commitments made by the Bidder at the oral presentation, if any, will be considered binding. The evaluation and ranking of oral presentations will be accomplished by an evaluation team, to be designated by HCA. Internal and external participants/evaluators may be present at oral presentations.

The scores from the evaluation (Executive Order 18-03, Written Proposal, and Cost Proposal) and the oral presentation combined will determine the Apparent Successful Bidder.

F. Total Score

<b>Evaluation Table – All Scored Items</b>		
<b>Section/Exhibit</b>	<b>Title</b>	<b>Maximum Points</b>
	Written Proposal	1,180
	Cost Proposal	210
	Executive Order 18-03	50
<b>Total Maximum Points without Oral Presentation</b>		<b>1,440</b>
	Oral Presentation (if required)	100
<b>Total Maximum Points with Oral Presentation</b>		<b>1,540</b>

**4.3 BEST AND FINAL OFFER (BAFO)**

HCA reserves the right to use a Best and Final Offer (BAFO) before awarding any contract to further assist in determining the ASB(s).

**4.4 SUBSTANTIALLY EQUIVALENT SCORES**

Substantially Equivalent Scores are scores separated by two percent (2%) or less in total points. If multiple proposals receive a Substantially Equivalent Score, HCA may leave the matter as scored, or select as the ASB the one proposal that is deemed by HCA, in its sole discretion, to be in HCA’s best interest relative to the overall purpose and objective as stated in Section 1.3 of this RFP.

If applicable, HCA’s best interest will be determined by HCA staff, who have sole discretion over this determination. The basis for such determination will be communicated in writing to all Bidders with Substantially Equivalent Scores.

**4.5 NOTIFICATION TO BIDDERS**

HCA will announce the ASB to all Bidders via the WEBS notification system.

**4.6 DEBRIEFING OF UNSUCCESSFUL BIDDERS**

Any Bidder who has submitted a proposal and been notified it was not selected for contract award may request a debriefing conference. The request for a debriefing conference must be received by the RFP Coordinator no later than 5:00 p.m., Pacific Time, within three (3) Business Days after the Unsuccessful Bidder Notification is e-mailed to the Bidder. The debriefing will be held within three (3) Business Days of the request, or as schedules allow.

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

- A. Evaluation and scoring of the Bidder’s Proposal;
- B. Critique of the Proposal based on the evaluation; and
- C. Review of the Bidder’s final score in comparison with other final scores without identifying the other Bidders.

Topics a Bidder could have raised as part of the COMPLAINT PROCESS (Section 2.8) cannot be discussed as part of the debriefing conference, even if the Bidder did not submit a complaint.

Comparisons between proposals, or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of thirty (30) minutes.

#### **4.7 PROTEST PROCEDURE**

A protest may be made only by Bidders who submitted a response to this RFP and who have participated in a debriefing conference. Upon completing the debriefing conference, the Bidder is allowed five (5) Business Days to file a protest. Protests must be received by the Contracts Administrator no later than 4:30 p.m., Pacific Time, on the fifth Business Day following the Bidder's debriefing. Protests must be submitted by e-mail to ensure timely receipt.

Consistent with RCW 39.26.030, proposal submissions and proposal evaluations will be available for public inspection following the announcement of ASB(s). If requested by a Bidder who received a debriefing pursuant to Section 4.6, the protest period will not conclude before the requestor has been provided with the applicable proposal submissions and proposal evaluations and provided five (5) Business Days to review the same. Bidder is responsible for notifying the RFP Coordinator of any such public disclosure requests so the timeline can be adjusted accordingly.

Bidders protesting this RFP must follow the procedures described below. Protests that do not follow these procedures will not be considered. This protest procedure constitutes the sole administrative remedy available to Bidders under this RFP.

- A. All protests must be in writing, addressed to the Contracts Administrator, and signed by the protesting party or an authorized agent. The protest must state (1) the RFP number, (2) the grounds for the protest with specific facts, (3) complete statements of the action(s) being protested, and (4) the relief or corrective action being requested. Protests must be emailed to [contracts@hca.wa.gov](mailto:contracts@hca.wa.gov) with the following subject line: "RFP # Protest – [Bidder Name]"
- B. Only protests alleging an issue of fact concerning the following subjects will be considered:
  - i. A matter of bias, discrimination, or conflict of interest on the part of an evaluator;
  - ii. Errors in computing the score; or
  - iii. Non-compliance with procedures described in the RFP, HCA's protest process, or Department of Enterprise Services (DES) policy requirements (POL-DES-170-00).

Protests based on anything other than those items listed above will not be considered. Protests will be rejected as without merit to the extent they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal; or 2) HCA's assessment of its own needs or requirements.

- C. Upon receipt of a protest, HCA will undertake a protest review. The HCA Director, or an HCA employee delegated by the HCA Director who is a neutral party with no involvement in the evaluation and award process (Protest Officer), will review and respond to the protest. If the HCA Director delegates the protest review to an HCA employee, the Director nonetheless reserves the right to make the final agency decision on the protest. The Protest Officer will have the right to seek additional information regarding the Solicitation from sources they deem appropriate in order to fully consider the protest.

- D. If HCA determines in its sole discretion that a protest from one Bidder may affect the interests of another Bidder, then HCA may invite such Bidder to submit its views and any relevant information on the protest to the Protest Officer. In such a situation, the protest materials submitted by each Bidder will be made available to all other Bidders upon request.
- E. The Protest Officer will issue a written protest response no more than ten (10) Business Days after receipt of the protest, unless additional time is needed, in which case HCA will notify the protesting Bidder in writing. The Protest Officer's decision is final unless the HCA Director exercises their right to make the final agency decision on the protest. There will be no appeal process.
- F. The final determination of the protest will:
  - i. Find the protest lacking in merit and uphold HCA's action; or
  - ii. Find only technical or harmless errors in HCA's acquisition process and determine HCA to be in substantial compliance and reject the protest; or
  - iii. Find merit in the protest and provide options to the HCA Director, which may include:
    - 1) Correct the errors and re-evaluate all proposals; or
    - 2) Issue a new solicitation document and begin a new process; or
    - 3) Make other findings and determine other courses of action as appropriate.

If the protest is not successful, HCA will enter into a contract with the ASB(s), assuming the parties reach agreement on the contract's terms.

## 5. RFP EXHIBITS

Exhibit A - Bidder Forms and Certifications (included as a separate attachment)

Exhibit B - Draft Contract (included as a separate attachment)

Exhibit C - Written Proposal

Exhibit D - Cost Proposal (included as a separate attachment)

## **EXHIBIT A – BIDDER FORMS AND CERTIFICATIONS**

Exhibit A is included as a separate document.



## **EXHIBIT B – DRAFT CONTRACT**

Exhibit B is included as a separate document.

## EXHIBIT C – WRITTEN PROPOSAL

**Section 1. Bidder Qualifications and Experience (Management Response)** – Each question in this section has the same maximum point value. *Current score/weight is 5.*

- 1.1. Please describe any programs, policies or activities of your organization that support human health and environmental sustainability in your business practices. If a program, policy or activity is specifically applicable to this Contract, please indicate.
- 1.2. Please indicate whether you meet the minimum qualification requirement that your firm have delivered Supported Employment (SE) and Supportive Housing (SH) Training and TA Services within at least three (3) states during the past two (2) years.
- 1.3. Please indicate whether you are seeking to provide services (TA and training) in the area(s) of SE, SH, or Policy.
- 1.4. Please describe the experiences, skills and qualifications your organization possesses that are relevant to your ability to perform the Contract that is the subject of this Solicitation. Please ensure that your answer to this question includes all information that you wish HCA to consider in determining whether you meet the minimum Bidder qualifications set forth in the Solicitation Document. Please identify SH SE, and Policy clearly and separately and include any relevant experience around the different topics listed in this RFP (Section 1.3, Scope of Work) that distinguishes your organization or makes it uniquely qualified for the Contract.
- 1.5. Key Personnel Information. Please provide the names of people who Bidder has employed or has a history of contracting with, who will serve as Bidder’s Key Personnel, using the following format:

Name/Position	Subject Matter Expertise	Availability	Proposed Roles	Resumé describes relevant experience

- 1.6. Webinar/Training-SE Topics. Please describe your experience providing webinar or live training topics in the field of SE you have led during the past two (2) years to include the below information, using the following format:

Name of webinar or live training topic	State(s) where provided	Facilitator (name/position)	Target Audience	Audience Size	Average Participant Rating

- 1.7. Webinar/Training-SH Topics. Please describe your experience providing webinar or live training topics in the field of SH you have led during the past two (2) years, using the following format:

Name of webinar or live training topic	State(s) where provided	Facilitator (name/position)	Target Audience	Audience Size	Average Participant Rating

- 1.8. Please include catalog of previously recorded webinars or live trainings completed in the past three (3) years, using the following format:

Name of webinar or live training topic	State(s) where provided	Facilitator (name/position?)	Target Audience	Audience Size	Average Participant Rating

- 1.9. Have you prepared webinars or training curriculum for previous projects that you can utilize for this contract? Please describe.
- 1.10. Would you consider the curriculum to be classified as evidence-based? If yes, please describe.
- 1.11. Would you consider the curriculum to be classified as research-based? If yes, please describe.
- 1.12. Would you consider the curriculum to be classified as promising practices? If yes, please describe.
- 1.13. Have you prepared TA materials for previous projects that you can utilize for this contract? Please describe.
- 1.14. Please provide a list of TA/consulting projects in the field of SE and/or SH you have led during the past two (2) years, using the following format:

Date of Event	Indicate SE or SH	Name of TA or consulting project	State(s) where provided	Facilitator (name/position?)

- 1.15. Describe your organization's involvement in the fields of SE and/or SH, at a national level and at a state policy level. Please indicate if you are referencing SE and/or SH.
- 1.16. Describe general experience supporting government and/or quasi-government entities to address policy changes and/or legislative shifts and trends.
- 1.17. Provide a detailed example of a related policy development or update project you were involved with, including, but not limited to: type of government (federal, state, county, city) or quasi-government entity, title and summary of policy, resulting legislation/statute, stakeholders, impact on customers, strengths, weaknesses, opportunities, challenges.
- 1.18. Describe any programs or initiatives you are working on that could be perceived as a conflict of interest. How would you address this?

**Section 2. Bidder's Solutions and Proposed Approach (Technical Response) *Current score/weight is 5.***

- 2.1 In reviewing the topics suggested in the RFP for webinar and live training in the area of SE, do you have additional or different topics you believe would be more effective?
- 2.2 In reviewing the topics suggested in the RFP for TA in the area of SE, do you have additional or different topics you believe would be more effective?
- 2.3. In reviewing the topics suggested in the RFP for webinar and live training in the area of SH, do you have additional or different topics you believe would be more effective?
- 2.4 In reviewing the topics suggested in the RFP for TA in the area of SH, do you have additional or different you believe would be more effective?
- 2.5 Describe strategy to effectively implement SH.
- 2.6 Describe strategy to effectively implement SE.
- 2.7 Describe strategy/approach to support government and/or quasi-government entities to develop and/or modify policies and to address legislative shifts and trends.

**EXHIBIT D – COST PROPOSAL**

Exhibit D is included as a separate document.