



Transforming lives

**COMPETITIVE SOLICITATION
#2123-778
REQUEST FOR PROPOSALS**

Project Title:

**ADOBE EXPERIENCE
MANAGER IMPLEMENTATION**

Estimated Contract

Performance Period:

October 21, 2021 through May 21, 2023
awarded contract may be extended by
amendment up to two (2) times in 1 year
increments (potential total of 2 years).

Response Due Date:

All Responses **must be received in their entirety by 2:00 p.m.** Pacific Time on 09/07/2021 unless an Amendment is issued modifying the Solicitation Schedule set forth in Section C.1 of this Solicitation Document.

Submit Response To:

Responses must be submitted to:
Amel Alsalman, Solicitation Coordinator
Department of Social and Health Services
Facilities, Finance and Analytics Admin.
Central Contracts and Legal Services
Email: amel.alsalman@dshs.wa.gov

Solicitation and Amendments

Will Be Posted on:

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

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

Applicable WEBS Commodity Codes: 952-43, 918-29 Computer Software Consulting, 208-36 Data Processing Software, Microcomputer

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SECTION A CONTRACT REQUIREMENTS

1. Purpose

This competitive solicitation is issued in order to assist the Economic Services Administration (ESA), Division of Child Support (DCS) of the Washington State Department of Social and Health Services (DSHS) in seeking qualified contractor(s) for Implementation of the Adobe Experience Manager (AEM) as follows:

- a. Fully replace the Central Pro software currently in use. This allows DCS to utilize supported, modern software to generate forms and be the first step towards modernization of the forms generation system.
- b. The replacement of Adobe Output Designer and Adobe Form Designer, the software currently used to design and develop forms, with functionality available in the AEM product.
- c. The Division has approximately 300 XFT files being hosted by a Visual Basic screen in the FormsGen section of the SEMS application. Division staff use these XFT files to generate the forms used in managing child support cases. In this project, the Vendor will work with agency staff to convert all existing XFT files to the AEM format (approximately 300). Part of this process will be actively training agency staff on conversion and development of forms in the AEM environment.
- d. The Division wants to develop online forms for use by customers and businesses. The first online form will be the application for services form used to open a child support case. This includes development of a portal used by customers to access the application, storage and transmittal of application data, and integration into the SEMS application.

DCS will be purchasing Adobe-managed hosting services for the AEM product. Adobe intends to deploy the software in a separate environment in the Amazon Web Services Government Cloud and with FedRAMP compliance. DCS will be using Secure Access Washington (SAW) for authenticating external users and Active Directory to authenticate internal users to the Adobe-managed hosting environment for the AEM product. Basic Information about Secure Access Washington can be found at:

<https://watech.wa.gov/services/SecureAccess-Washington>. This will include 200 hours of training included in bids with the option for DSHS to purchase additional training at the rate provided.

2. Background

The Department of Social & Health Services, Washington's largest state agency, provides some type of shelter, care, protection and/or support to 2.4 million of our state's 7.2 million citizens. A single mission ties DSHS' Administrations together: To Transform Lives. DSHS is comprised of two support Administrations and six direct service Administrations. Each service Administration provides specialized services to Washington state citizens in need.

The Economic Services Administration (ESA) works to build a Washington without poverty and injustice by helping children, adults, and families weather the storms of life so they can reach their full potential through various programs. A national leader in providing poverty reduction services to nearly 1.8 million people in our state. ESA provides tools and resources to build well-being including cash grants, food and medical assistance, employment-focused services, refugee assistance, disability determinations and child support collection.

The Division of Child Support (DCS) strives to transform lives by delivering excellent child support services. DCS is responsible for the establishment, modification, enforcement, and disbursement of child support and serves more than 740,000 parents and children. The Access and Visitation Program is an important part of ongoing efforts to connect families to the resources they need so children can thrive.

The Support Enforcement Management System (SEMS) is the mission critical, case management system custom-developed by the DCS in support of Washington State's child support program and services. In State Fiscal Year 2019, SEMS processed over \$670 million in child support collections for approximately 350,000 open cases. A major part of the system is the generation of forms both by staff and through batch processes that support case management activities in the establishment and collection of child support orders, and in the processing and distribution of child support payments.

Currently the Division uses Central Pro (formerly Jetform, Accelio) software to create and archive forms, and Adobe Output Designer to develop the forms. DCS implemented the software in March, 2004, and have built the current forms generation system around these products. About 200,000 forms are generated each month by staff and through automated batch processes of approximately 3500 different form templates. Central Pro and Output Designer became unsupported by Adobe in June, 2010.

3. Project Scope

The Apparent Successful Bidder (ASB) shall work with DCS staff to develop requirements and design, develop a work plan and contribute to project artifacts maintained by the DCS Project Manager, software implementation, documentation and training needed for:

- a. Full replacement of Central Pro software. AEM needs to be integrated into SEMS, providing similar functional processes, products, and outcomes. Work will include conversion of existing forms/form templates to formats used by AEM. Adobe Output Designer and Adobe Form Designer, currently used to design and develop forms, will need to be replaced with functionality available in the AEM product;
- b. Work with agency staff to convert approximately 300 XFT files that are hosted by the Visual Basic FormsGen screen in the SEMS application to the AEM format with functionality in the AEM product;
- c. Development of an online application for services. This includes development of a portal used by customers to access the application, storage and transmittal of application data, and integration into the SEMS application; and

(1) The Vendor will also work with DCS staff to transfer the knowledge

necessary to establish more forms in the online interface.

- d. Training for DCS IT staff on the use of AEM in the above identified areas.

The ASB must ensure it has adequate resource for supporting the project, performing the work, meeting the objective, and producing the deliverables.

- e. Project Support

- (1) DCS will provide overall project management and determine the project management methodology that will be used.
- (2) Bidder is responsible for managing all vendor staff and services required for the successful completion of the Deliverables identified in this RFP.
- (3) Bidder will provide a vendor Project Lead to work with the DCS Project Manager. The Project Lead should be experienced in Information Technology (IT) project management and meet the other required qualifications listed in section 5. Bidder Minimum Qualification, of this RFP document.
- (4) Bidder shall contact the DCS Project Manager within five (5) business days after the Agreement is executed to schedule an initial kick-off session that shall occur within ten (10) business days of the Agreement executions.
- (5) Bidder shall prepare and submit an initial project schedule using Microsoft Office products and Microsoft Project, or comparable software program that is compatible with Agency's existing system. The project schedule shall at a minimum:
 - (a) Identify the steps and associated timelines necessary for Bidder to complete each task and related Deliverables in accordance with the Agreement and Statement of Work;
 - (b) Contain an initial project Services schedule;
 - (c) Identify and contain Milestones;
 - (d) Identify critical path tasks, e.g., those actions and events that substantially impact the timely and successful completion of the final Deliverable and successful project completion;
 - (e) Identify Bidder personnel resources to be assigned that would include without limitation the number of personnel, their skill sets, planned dates and duration of deployment and all other related matters; and
 - (f) Identify Agency personnel resource assignment needs, e.g., the number of participating Agency personnel, their recommended skill sets, the desired dates and duration of deployment and all other related matters.

- (6) Bidder shall prepare and submit a written Work Plan using Microsoft Office products and Microsoft Project, or comparable software program that is compatible with Agency's existing system. The Work Plan shall at a minimum include the following:
 - (a) Process and procedures for Deliverables;
 - (b) Any instructions and checklists regarding Bidder's preparations for on-site services;
 - (c) Methodology and approach to achieve the Deliverables defined in the Statement of Work, including an estimate of Agency resources required to support this effort. Once agreed upon, these will become part of the project Deliverables; and
 - (d) Process and procedures for project close out.
- (7) Prepare and submit bi-weekly project status reports. The status reports must be in the format approved by the Agency and include:
 - (a) Accomplishments;
 - (b) Critical issues;
 - (c) Personnel utilized;
 - (d) Items planned for the next reporting period; and
 - (e) Identified issues and risks and associated mitigation strategies in support of the Issues and Risk Management Plans.

The Status Reports must conform to the requirements of this Agreement and will be submitted to the DCS Project Manager.

- (8) Attend Agency meetings and present Project status as directed by the DCS Project Manager.

f. Business Analyst Services

- (1) Assist DCS Business Analysts in developing business and functional requirements needed for the work items included in the Design/Setup activities (3.c.) and Development/Integration activities (3.d) sections.
- (2) Requirements specifications will be documented using Microsoft Office products and/or MS Project and follow industry standards/best practices.

g. Design/Setup activities

- (1) Work with agency staff to develop and document:
 - (a) Forms (logical) architecture;

- (b) Deployment architecture;
 - (c) High level technical design;
 - (d) Forms Schema(s); and
 - (e) Building Blocks, including the form data model, document fragments, experience fragments, and multi-channel templates.
- (2) Design should include, but not be limited to:
- (a) Forms Schema(s) determination and design;
 - (b) Forms generation workflows;
 - (c) Create fragments design and layout for all headers and footers, and for all common sections identified in the design phase;
 - (d) List all variables in each template;
 - (e) Identify logical sections of each template;
 - (f) Determine common sections;
 - (g) Determine whether each section is required or optional;
 - (h) Determine data elements or sections that are repeating;
 - (i) Determination of frontend approach Interactive Communications (IC) vs adaptive forms;
 - (j) Replacement of SEMS forms generation front end with AEM IC or Adaptive forms;
 - (k) A custom front end for the search and retrieval of forms history (WinForms replacement);
 - (l) Determine relationships between forms (e.g. parent / child);
 - (m) Determine pagination requirements for each template;
 - (n) Identify common templates (e.g. templates that have no unique sections);
 - (o) Obtain barcode requirements for each template;
 - (p) Obtain images and rendition size(s) of each image;
 - (q) User groups and Access Control List (ACL) setup (Lighweight Directory Access Protocol (LDAP) configurations);
 - (r) Adobe Managed Services (AMS) environments configurations;

- (s) Email Simple Mail Transfer Protocol (SMTP) configuration;
 - (t) AEM configuration;
 - (u) Determine batch processing and bundling business rules needs; and
 - (v) Determine the search and retrieval of forms history workflow.
- (3) Support customer in setting up Structured Query Language (SQL) storage for forms archival.
 - (4) Evaluation of reporting needs and forms volumes to create workflows for reporting forms statistics and volumes.
- h. Develop/Integration activities:
- (1) Use XML schema(s) as form model;
 - (2) Configure a data source for a RESTful service;
 - (3) Create a form data model for the data source;
 - (4) Configure the form data model with data model objects, services, relationships, and expressions to automate business rules;
 - (5) Generate sample data files to test your form data model and interactive communications (XML);
 - (6) Create document fragments including text, list, and conditions;
 - (7) Create up to 15 XDP templates in AEM Forms Designer for the Print Channel;
 - (8) Create an Interactive Communication Document for the Print channel;
 - (9) Create up to 15 editable templates in AEM for the Web Channel;
 - (10) Create an Interactive Communication Document for the Web channel;
 - (11) Create an auto-synchronized Interactive Communication for both channels;
 - (12) Update Interactive Communications as a front-end employee with the Agent user interface (Agent UI);
 - (13) Create forms in AEM User Interface (UI)
 - (14) Convert all existing forms (approximately 300) to adaptive forms design, layout, business rules, and JS coding;
 - (15) Support DSHS team to create up to 1,500 form XDP templates design and layout;

- (16) Create multiple workflows for response of forms based on form content (packet number);
- (17) Submission of forms to email within the forms with specific token to access portal and respond;
- (18) Online forms access via Secure Access Washington (SAW) accounts;
- (19) Convert print request to PDF/A and store into archival Azure/Cosmos databases;
- (20) Build the following workflows:
 - (a) Update mainframe workflow using REST web service;
 - (b) Certified Mail Record workflow;
 - (c) Archiving workflow (conversion to PDF/A and store Azure/Cosmos);
 - (d) Add Intelligent Mail Barcode (IMB) workflow;
 - (e) Output Multiple Recipients (print, email, electronic file) workflow; and
 - (f) The search and retrieval of forms history workflow.
- (21) Setup batch processing and bundling business rules;
- (22) Setup multiple watch folders/queues to handle multiple offices;
 - (a) One folder/queue per office (total of 11).
 - (b) Additional folders/queues to handle overnight/batch processes.
- (23) Generate IC or Adaptive form front-end for search and retrieval of form archives;
 - (a) List of matching records based on user search criteria.
 - (b) Accessing PDF/A files from Azure/Cosmos for user download and viewing.
 - (c) Demonstrate how to show read-only (non-printable) PDF/A to user.
- (24) Replacement of SEMS forms generation front end with AEM IC or Adaptive forms;
- (25) Integration with the OCSE (Federal Office of Child Support Enforcement) for sending forms to be printed;
 - (a) Within the normal form-processing workflow, identify the forms that need to be delivered to employers via the eIWO process with OCSE.

- (b) Extract the eIWO forms/records to build a character-delimited extract file that is used to build the outgoing file for OCSE.
- (26) Add barcodes (Interleaved 2 of 5, Code 128, QR code, POSTNET), foreign language pages, and page numbering (renumbering);
- (27) Adobe Form Designer and Adobe Output Designer completely replaced with AEM, providing same or improved functionality for designing and developing forms;
- (28) Online application for DCS services in place with portal used by customers to access the application, storage and transmittal of application data, and integration into the SEMS application;
- (29) Create workflows for reporting forms statistics and volumes to replace the existing electronic reports; and
- (30) Setup and demonstrate Adobe Sign using IC or Adaptive forms and demonstrate to Agency staff how to:
 - (a) Send a document to single signer;
 - (b) Send a document to multiple signers;
 - (c) Self-sign a document; and
 - (d) Configure Adobe Sign with DSHS brand and graphics.
- i. Quality Assurance (QA) activities
 - (1) Work with Agency staff to develop and conduct testing for:
 - (a) Letter templates, fragments, and schemas;
 - (b) Batch processing workflow;
 - (c) Forms generation workflow;
 - (d) Archival and retrieval workflows;
 - (e) Update mainframe using REST web service workflows;
 - (f) Certified Mail Record workflow;
 - (g) Add Intelligent Mail Barcode (IMB) workflow;
 - (h) Output Multiple Recipients (print, email, electronic file) workflow; and
 - (i) The search and retrieval of forms history workflow.
 - (2) Converted templates must be verified as usable
 - (a) DCS will provide Testing Scenarios to use in user testing. Templates

converted will require testing and acceptance by DCS.

- (b) DCS will provide sample files of the InForm Document files/templates for vendor to use to test conversion.
- (c) Bidder will assist with testing of the converted templates.
- (d) DCS will test the generated forms to ensure output is accurate prior to signing off on user acceptance.

j. Documentation and Knowledge Transfer

- (1) Bidder will provide training to between 8 and 12 Agency staff as part of and during the implementation project.
- (2) Bidder will provide training to Business Users (Author) on AEM Sites Author and Web Experiences. Training should include XML Documentation using web based Darwin Information Type Architecture (DITA) Component Content Management System (CCMS) editor.
- (3) Bidder will provide training to Business Users (Author) and developers on AEM Forms Designer & HTML Forms with Designer.
- (4) Bidder will provide advanced training for developers to include but not limited to:
 - (a) Use AEM Workbench to design, develop, test and deploy AEM forms and JEE applications;
 - (b) Create AEM Forms templates and adaptive forms. Including how to use the Rule Editor, Themes, Document of Record (DOR), and Accessibility options;
 - (c) Create and add components, sub forms, headers, and footers;
 - (d) Generate custom workflows;
 - (e) Open Service Gateway Initiative (OSGI) services and components;
 - (f) Web Experiences management;
 - (g) Manage data and workflows;
 - (h) Develop and customize data models; and
 - (i) Report building.
- (5) Bidder will provide training to Agency IT Operations team on AEM System and Forms Administration, to include installing, configuring, maintaining and troubleshooting.
- (6) Bidder must provide User Acceptance Testing (UAT) and development,

Quality Assurance and production deployment documentation and support.

- (7) Training must be complete with documentation and hands-on/virtual knowledge transfer sessions.
- (8) Training must be provided in Olympia, WA at a DSHS facility whenever possible. Due to the current coronavirus pandemic, virtual training is an acceptable alternative upon agency approval.
- (9) Bidder must note all travel costs separately on the bidder response. All Travel Costs must follow SAM rules or OFM Guidelines for travel (<https://ofm.wa.gov/accounting/administrative-accounting-resources/travel>)

k. Deliverables Acceptance

- (1) Deliverables shall not be deemed accepted until explicitly approved by the Agency in writing by the DCS Project Manager.
- (2) The Agency has five (5) business days to review the deliverable and either accept or reject it in writing. Deliverables that are rejected by the Agency will be returned to the Bidder for review and correction. The Bidder will have five (5) business days to make corrections and return to the Agency for review.
- (3) All Deliverables shall be submitted in conformance with the Project Scope, Project Schedule (unless agreed otherwise), and shall include all components identified therein.

l. Project Closeout

At the conclusion of all Services, the Bidder will create and deliver a Project Closeout document that, at a minimum, summarizes:

- (1) Major accomplishments;
- (2) Deliverables checklist;
- (3) Performance to schedule;
- (4) Performance to budget;
- (5) Satisfaction and acceptance of all project services;
- (6) Lessons learned; and
- (7) Outstanding risk or issues that the Agency must address.

Bidder shall identify the key personnel it shall utilize in performing this Contract, and their experience and qualifications, as part of its Response. If awarded a Contract, Bidder shall not make changes to such Key Personnel during the term of the Contract except as

requested or approved by DSHS.

4. Deliverables

a. Project Support Services:

- (1) Set up and attend the Project Kick-off Session.
- (2) A schedule for requirements and a tentative rough schedule for design to be submitted to the DCS IT Project Manager within ten (10) business days of the kick-off session. The Project Schedule shall be maintained and updated throughout the life of the project.
- (3) A Work Plan showing migration phases and tasks to be submitted to the DCS Project Manager within 30 calendar days of the kick-off session. The Work Plan will also include:
 - (a) Data Migration Plan;
 - (b) Training Plan; and
 - (c) Deployment Plan;
- (4) A bi-weekly Project Status Report detailing progress on tasks, milestones, and Deliverables, to be submitted to the DCS Project Manager every other Monday throughout the life of the project.

b. Architecture and Design:

- (1) Forms architecture document;
- (2) Deployment architecture document;
- (3) Technical design document that includes, but is not limited to, the items identified in the Project Scope, Design/ Setup activities, Sect. 3.c.
- (4) Document identifying AEM Building Blocks, to include, but not limited to, the form data model, document fragments, experience fragments, and multi-channel templates.

c. Work identified in Section 3.d. completed, fully functional, and operating in the production environment, including:

- (1) Central Pro software completely replaced with AEM, providing same or improved functionality;
- (2) Adobe Output Designer completely replaced with AEM, providing same or improved functionality for designing and developing forms;
- (3) User interfaces completed as identified in 3.d.;
- (4) Up to fifteen (15) XDP templates in AEM Forms Designer for the Print

Channel created;

- (5) Up to fifteen (15) editable templates in AEM for the Web Channel created;
 - (6) All existing forms (approximately 300) converted to adaptive forms design, layout, business rules, and JS coding;
 - (7) Two (2) prefill services for adaptive forms;
 - (8) Up to 1,500 form SDP templates design and layout created;
 - (9) Online application for services in place with portal used by customers to access the application, storage and transmittal of application data, and integration into the SEMS application;
 - (10) Document showing schema design and definitions;
 - (11) The workflows identified in section 3.d. created and documented:
 - (a) Forms generation workflow;
 - (b) Multiple workflows for response of forms based on form content (packet number);
 - (c) Update mainframe using REST web service;
 - (d) Certified Mail Record;
 - (e) Archiving (conversion of PDF/A and store in Azure/Cosmos);
 - (f) Output Multiple Recipients (print, email, electronic file); and
 - (g) The search and retrieval of forms history, reporting forms statistics and volumes to replace the existing electronic reports.
 - (12) Adobe Sign setup, demonstrated, and documentation on use.
- d. Documented results of unit testing for:
- (1) Letter templates, fragments and schemas;
 - (2) Batch processing workflow;
 - (3) Forms generation workflow; and
 - (4) Archival and retrieval workflows.
- e. Test plan for user testing of converted templates.
- f. Training plan addressing all the topics identified in section 3.f.
- g. Training and knowledge transfer documentation identifying setup, use, maintenance and administration of the topics identified in section 3.f., and

other areas identified during the project by agency and vendor staff.

- h. UAT and production deployment documentation.
- i. Project Closeout Document summarizing, at a minimum:
 - (1) Major accomplishments;
 - (2) Deliverables checklist;
 - (3) Performance to schedule;
 - (4) Performance to budget;
 - (5) Satisfaction and Acceptance of all Project Services;
 - (6) Lessons learned; and
 - (7) Outstanding risk or issues that the Agency must address.

5. Bidder Minimum Qualifications

All Bidders must meet the following minimum qualifications:

- a. Experience Requirements
 - (1) Bidder must have at least three (3) years' direct or comparable experience in migrating forms programs from legacy software to AEM.
 - (2) Bidder must include at least two (2) letters of reference stemming from successful similar projects where the project was completed on-time and within budget. One (1) of the letters of reference must have been done for a government agency with a scope similar to this project.
- b. Certification/Licensure Requirements
 - (1) The Bidder must have achieved Adobe Silver partner level or higher with a specialization in Adobe Experience Manager. Additional points will be awarded for bidders who have achieved Adobe Gold partner level. Any sub-contractors proposed by the bidder must have achieved Adobe Silver partner level or higher with a specialization in AEM.
- c. Staff and Staff Qualification Requirements
 - (1) Essential contractor personnel working on the migration portion of the project will need three (3) years' experience with the Adobe Experience Manager and have participated in at least one (1) successful migration involving Adobe Experience Manager within the last five (5) years.
 - (2) It is desirable that Bidder's Project Lead be certified in a recognized project management methodology and have at least three (3) years of professional IT project management experience and have a track record of successful IT project management on their resume.
 - (3) At least one (1) member of Contractor team working on the project must

have certification from Adobe as an AEM Forms Developer and be able to provide training and coaching to agency staff during the implementation project.

- (4) The Bidder shall use best efforts to ensure that personnel assigned to this Contract are available until the completion of the Contract. Any proposal by Bidder for changes, replacement, or substitution of personnel during the term of the Contract shall be submitted to DCS in writing. DCS shall have the sole discretion to accept or reject such proposal. In the event of a rejection by DSHS, Contractor must submit at least one alternative choice personnel for consideration by DSHS.
- (5) DCS reserves the right to terminate either negotiations or the contract (for non-contested Default) should Vendor request 25% or more of staff substitutions.

d. Service Location Requirements

- (1) Bidder staff will need to be onsite no less than during the initial setup installation/configuration of the product. Bidder may propose a solution that allows for staff to remain on site throughout the project; DCS shall have final approval on this option.
- (2) DCS will provide a standard staff workstation (chair, desk, telephone) and basic office supplies for Bidder's staff while onsite. Access required to setup, configure, and integrate AEM will be granted as needed. Bidder must provide the equipment and materials necessary for vendor staff if working remotely once onsite work is completed.
- (3) All Bidder Staff shall be required to sign Non-DCS Employee Confidentiality Agreements (see Attachment A Sample Contract).

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

6. Period of Contract Performance

DSHS intends to award one Contract for the Services described in this Competitive Solicitation. The period of performance under the Contract shall be approximately 18 months 10/21/2021 through 5/21/2023. The term of the contract may be extended by amendment up to two (2) times for up to one (1) year per amendment, in the sole discretion of DSHS. Additional services that are appropriate to the scope of this Solicitation, as determined by DSHS, may be added to the Contract in a mutually agreeable amendment.

7. Funding

DSHS has budgeted an amount not to exceed \$ 2,146,400.00 for this Project. DSHS may reject any Response in excess of that amount. Any Contract awarded is contingent upon the availability of funding.

SECTION B DEFINITIONS

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

ACL – Access Control List is a list of user permissions for a file, folder, or other object.

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

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

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

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

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

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

Building Blocks - Functionality in Adobe Experience Manager (AEM) software that allow content authors to reuse content across multiple channels.

Business Requirements – The critical activities of an enterprise that must be performed to meet the organizational objectives while remaining solution independent.

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

Configuration – The arrangement or setup of software by defining the values of parameters, selecting options/functions and setting workflows/processes.

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

Conversion – The process of converting a file from one type to another type.

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

Custom application (agent) - an application/script developed in-house to meet a specific

need in the forms generation system.

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.

FormsGen - The applications used by agency staff in the Support Enforcement Management System (SEMS) to create and generate the forms needed to manage child support cases.

Functional Requirements – The technical functions or system changes needed to enable users to accomplish their tasks.

IFD – InForm Document file type which is the Adobe Output Designer forms definition source file.

Interactive Communications (IC) – A personalized, interactive, and device friendly HTML-based digital correspondence, statement, or document. Interactive Communications are responsive in nature and change layout and design automatically based on user device and settings.

JavaScript (JS) – A text-based programming language used both on the client-side and server-side that allows you to make web pages interactive.

Knowledge base – A self-serve online library of information about a product.

LDAP – Lightweight Directory Access Protocol is an open, vendor-neutral, industry standard application protocol for accessing and maintaining distributed directory information services over a network.

MDF - Adobe Output Designer compiled IFD template file type.

Migration – The process of moving a file from the use of one operating environment to another operating environment.

Procurement - The broad process of identifying goods and services for purchase or acquisition, of effecting the purchase or acquisition, and of managing the purchase or acquisition. This Solicitation is a part of an overall Procurement process. Despite the broader meaning attributed to "procurement", for purposes of this Solicitation, the terms Solicitation, RFP/RFQ/RFQQ and Procurement are interchangeable.

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

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

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

Responsible Bidder – An individual, organization, public or private agency, or other entity

that has demonstrated the capability to meet all the requirements of the Solicitation and to meet the elements of responsibility. (See [RCW 39.26.160 \(2\)](#))

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

REST – The Representational State Transfer and is a style of software architecture used in Web development.

RESTful Services – A lightweight, maintainable, and scalable service that is built on the REST architecture.

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

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

SEMS – The Support Enforcement Management System, the current case management and payment distribution system used by the Washington State Division of Child Support (DCS) to establish, collect and distribute child support and developed and maintained by DCS IT.

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 consecutive years; or (b) Is certified with the office of women and minority business enterprises under [chapter 39.19 RCW](#).

SMTP – Simple Mail Transfer Protocol is used for sending e-mail over the internet.

Software - the object code version of computer programs related to this solicitation. Software also means the source code version and related utilities, provided by Vendor. Software includes all prior, current, and future versions of the Software and all maintenance updates and error corrections.

Software as a Service (SaaS) - means a software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted.

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

Solicitation Document – This RFP/RFQ/RFQQ document, including all attachments and

all amendments that are issued by the Coordinator.

SQL – Structured Query Language used in programming and designed for managing data in a relational database.

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

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

Training – The act/ process of teaching a person a particular skill that relates to specific useful competencies.

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

XFT - XML Format Template file type which is Adobe Form Designer forms definition.

XML – Extensible Markup Language which allows users to define their own customized markup languages, especially in order to display documents on the internet.

<p align="center">SECTION C EXPLANATION OF SOLICITATION PROCESS</p>

1. Solicitation Schedule

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

Item	Action	Date
1.	DSHS posts Competitive Solicitation.	08/09/21
2.	Prospective Bidders should register as a Vendor on WEBS using one of the commodities code on the cover page of this Solicitation as soon as possible to receive notifications.	
5.	Bidder may submit written questions or requests for change in Contract Requirements until 2:00 p.m. Pacific Time.	08/17/21
6.	DSHS will post responses to written questions.	08/24/21
7.	Bidders may submit written Complaints by 5:00 p.m. Pacific Time (five business days before Response is Due).	08/30/21
8.	Bidder must submit Response by 2:00 p.m. Pacific Time	09/07/21
9.	DSHS evaluation of written Responses	09/09/21- 09/13/21
10.	Oral presentations, if requested by DSHS	09/16/21
11.	Announcement of Apparent Successful Bidder(s) on WEBS and beginning of contract negotiations	09/22/21
12.	DSHS notifies unsuccessful Bidder(s)	09/22/21
13.	Unsuccessful Bidders may request a debriefing conference until 5:00_ p.m. Pacific Time	09/27/21
14.	DSHS holds debriefing conferences, if requested	09/28/21
15.	Deadline for submission of Protests by unsuccessful Bidders who participated in a debriefing conference	10/05/21 (Five business days after date of debriefing)
16.	DSHS considers Protests, if any, and issues determination	10/19/21
17.	Contract Execution/Start Date	10/21/21

2. Posting of Solicitation Documents

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

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

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

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

4. Communications regarding Solicitation

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

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

5. Questions and Answers

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

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

6. Request for Change in Solicitation Requirements

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

7. Complaints

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

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

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

In accordance with the legislative findings and policies set forth in RCW 39.19, 43.60A.200, 39.26.240 and 39.26.245, the State of Washington encourages participation by veteran-owned business enterprises and Minority-Owned and Women-Owned Business Enterprises (MWBE), either self-identified or certified by, respectively, the Department of Veterans Affairs or the Office of Minority and Women's Business Enterprises (OMWBE). While the State does not give preferential treatment, it does seek equitable representation from the veterans, minority and women's business communities.

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

Bidders may contact the Office of Minority and Women's Business Enterprises (OMWBE) at <http://omwbe.wa.gov/> and/or the Department of Veterans Affairs at <http://www.dva.wa.gov/program/veteran-owned-business-certification> to obtain information on certified firms for potential subcontracting arrangements or for information on how to become certified. Nothing in this section is intended to prevent or discourage participation from non-MWBE firms or non-veteran-owned businesses.

9. Auxiliary Aids and Limited English Proficient (LEP) Services

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

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

10. Cost to Prepare Response

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

11. Acceptance of Solicitation Terms

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

12. Joint Proposals

If Bidders submit a joint Response with one or more other persons or entities, these persons or entities must designate a prime Bidder. The prime Bidder will be DSHS sole point of contact through the Procurement process. If selected as the Apparent Successful Bidder, the prime Bidder shall sign the contract and any amendments and will be liable and responsible to DSHS for all performance under the contract.

13. Withdrawal of Responses

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

14. Ownership of Responses

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

15. DSHS Award Options; Improvement of Bid Offers

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

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

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

16. Oral Interviews or Presentations

After bids are received and written evaluations are completed, DSHS may request that one or more Responsible and Responsive bidders participate in an oral interview and/or presentation or demonstration. If this option is elected, additional points shall be awarded as set forth in Section E.3, Evaluation Criteria and Scoring of Responses.

17. Announcement of Successful Bidder(s)

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

Bidders who are not announced as an Apparent Successful Bidder may request a debriefing conference with the Coordinator concerning the evaluation of their bid and may, under certain circumstances, file a formal protest requesting that DSHS provide an identified remedy if Bidder believes certain types of errors occurred. A more detailed description of these processes is set forth in Section F, Debriefing and Protest Procedure.

18. Ethics, Policies and Law

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

Specific restrictions apply to contracting with current or former state employees pursuant to RCW 42.52. Bidders should familiarize themselves with the requirements prior to submitting a Response. Bidders must include, in their Letter of Submittal, information regarding any current or former state employees who are employed by, or subcontracted with, Bidder.

<p style="text-align: center;">SECTION D INSTRUCTIONS REGARDING CONTENT, FORMAT AND SUBMISSION OF WRITTEN RESPONSES</p>

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

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

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

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

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

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

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

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

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

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

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

4. Proprietary Information/Public Disclosure

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

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

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

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

5. Submission of Responses

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

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

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

6. Acceptable Electronic Formats for Submission of Responses

Attachment D, Bidder Response Form, should be submitted in Microsoft Word. Other Response documents must be formatted in Portable Document Format (Adobe Acrobat PDF) or Microsoft Word, Excel, or PowerPoint. Spreadsheet documents must be submitted in Microsoft Excel and in a live, unprotected file that includes all formulas, macros, and computations that are relied on or used to calculate any rates or values presented therein. When scanning documents to be submitted in PDF format, scanner resolution should be set to at least 200 dots per inch.

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

7. Alternative Submission Methods

Bidders wishing to request an alternative method for submitting their Response must contact the Coordinator at least ten (10) days before the Response Submission Date. No alternative submission method will be accepted unless agreed to by the Coordinator in writing prior to the Response deadline.

SECTION E EVALUATION OF RESPONSES

1. Bid Responsiveness; Administrative Review

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

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

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

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

2. Errors in Bidder Response

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

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

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

3. Evaluation Criteria and Scoring of Responses

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

The maximum number of points available for each Bidder is one thousand for hundred (1,400). The maximum number of points that may be assigned with respect to specific questions is set forth on Attachment D, Bidder Response form. The overall breakdown for Award will be based on the following criteria and will be in accordance with provisions identified in [RCW 39.26.160](#) and other criteria identified in the solicitation.

Criteria	Available points
Mandatory Bidder Qualifications and Experience (Management Response)	200
Desired Experience and Qualifications	455
Bidder's Solution and Proposed Approach (Technical Response)	245
Bidder's Proposed Price (Quotation or Cost Response)*	250
Optional Oral Evaluation Possible Points	200
Possible Evaluation Points	1350
Bidder EO 18-03 Certification.	50
Total Possible Points	1400

* Any reference where the purchaser was required to sign a lessons learned or similar non-disclosure agreement where the purchaser is enjoined from disclosing the quality, timeliness or cost of the services may be disqualified from the bidding pool and deemed non-responsive.

4. Evaluation of Cost Proposal/Quotations

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

low bid / higher bid = % of avail. points awarded * avail. points = total cost points

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

5. Written Bid Evaluation Process

DSHS shall designate an evaluation team of at least three (3) evaluators to review, evaluate, and score the written question responses. These evaluators will be selected based on their qualifications, experience, capability and background. If oral interviews or presentations are conducted, additional evaluators may supplement or replace some or all of the individuals performing the written evaluation.

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

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

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

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

7. Bidder's References

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

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

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

8. Oral Interview/Evaluation

In addition to evaluating the written response, DSHS may invite one or more of the highest scoring Bidders to make an oral presentation which shall be separately evaluated.

9. Selection of Apparent Successful Bidder

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

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

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

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

<p style="text-align: center;">SECTION F BIDDER DEBRIEFING AND PROTEST PROCEDURE</p>

1. Debriefing Conferences

No later than 5:00 p.m. on the third business day following the posted announcement of Successful Bidder(s) on WEBS, Bidders who are not selected as a Successful Bidder may send an email to the Coordinator requesting a Debriefing Conference. Since debriefing conferences pertain to the formal evaluation process, Bidders who were disqualified as nonresponsive and therefore did not go through the formal evaluation process are not entitled to request a Debriefing Conference. Unless a different date is agreed upon by the Coordinator, the Debriefing Conference will be held on a date designated in Section C.1., Solicitation Schedule. Discussion at the debriefing conference will be limited to the following:

- Evaluation and scoring of the Bidder's Response
- Critique of the Response based on the evaluation
- Review of Bidder's final score in comparison with the other final scores

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

2. Grounds and Filing of Protests

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

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

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

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

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

3. DSHS Protest Review Process

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

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

4. Determination of Protests

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

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

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

SECTION G CONTRACTING PROCEDURES

1. Contract Execution

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

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

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

2. Insurance

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

3. Non-Endorsement

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

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

4. Background Checks

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

5. Electronic Payment

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