

**STATE OF WASHINGTON
OFFICE OF FINANCIAL MANAGEMENT
OLYMPIA, WASHINGTON**

**REQUEST FOR QUALIFICATIONS
RFQ NO. 21-500**

Note to Vendors: This RFQ and any subsequent Amendments will be available on the Office of Financial Management (OFM) website at http://ofm.wa.gov/contracts_procurements/default.asp. Vendors are also encouraged to register on the Department of Enterprise Services (DES), Washington Electronic Business Solution (WEBS) Procurement Website at <http://des.wa.gov/services/ContractingPurchasing/Business/Pages/WEBSRegistration.aspx>. All RFQ Amendments and Bidder questions/OFM answers will be posted on the OFM website and on WEBS.

PROJECT TITLE: Washington State Compensation Surveys & Services

PROPOSAL DUE DATE: May 19, 2021, 3:30 PM Pacific Time, Olympia, Washington.

EXPECTED TIME PERIOD FOR CONVENIENCE CONTRACTS: June 18, 2021 – June 30, 2023.

BIDDER ELIGIBILITY: This procurement is open to those Vendors who satisfy the minimum qualifications stated herein and who are available for work in Washington State.

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1. INTRODUCTION

1.1 PURPOSE AND BACKGROUND

a. Services Required

- (1) The Office of Financial Management, State Human Resources (OFM) anticipates the need for a variety of compensation-related services. It is the intent of this Request for Qualifications (RFQ) to establish a Pre-Qualified Vendors List to provide market comparisons for Washington state compensation and benefits, and other expertise in the classification and compensation field.
- (2) Contractor(s) will conduct compensation and benefit surveys on behalf of OFM, provide consultation on survey methodologies and best practice, provide project management, manage participant communications during the survey process, conduct data collection, analysis and reporting, and provide expert witness consultation and testimony for interest arbitration hearings.
- (3) The Pre-Qualified Vendors List will also be used when ad hoc compensation consulting services are needed such as consultation, gathering and analyzing benefit plan values for health care, defined benefit and defined contribution retirement plans, and methods to adjust survey data based on economic factors such as cost of living versus cost of labor and currency exchange rates.

b. Contract Term

The period of performance of any contract resulting from this RFQ is tentatively scheduled to begin on or about June 18, 2021, and to end on June 30, 2023. Amendments extending the period of performance, if any, shall be at the sole discretion of OFM.

The resulting Convenience Contracts will have an initial term of two (2) years, with the potential for two (2) additional two-year extensions. The Pre-Qualified Vendors List may be utilized by OFM to select Contractors for work on an as-needed basis. Being awarded a contract through this competition does not guarantee a Contractor will receive work.

c. Background

- (1) OFM's State Human Resources Division serves as the state's central Human Resources (HR) policymaking body and provides leadership and support on enterprise HR strategic planning, collective bargaining and oversight of HR systems and structure, rules and policy. State HR Compensation Policy and Planning Unit also oversees state salary surveys.
- (2) State law (RCW [41.06.160](#), RCW [41.06.167](#), RCW [47.64.170](#)) requires OFM to conduct salary and benefits surveys for designated employee groups. In preparing classification and salary schedules, full consideration is given to the prevailing rates of other public and private employers.

- (3) For more information please refer to Exhibit B, Overview of Washington State Class Plan and Compensation Structures.

1.2 SERVICE CATEGORIES

Bidders must specify in their Proposal if they are bidding on Service Category 1, 2, or both. See Exhibit A for the complete Scope of Work for each service category.

a. Service Category 1: **Washington State Compensation Survey (SCS)**

- (1) The Contractor shall conduct, audit, analyze, report, and communicate results to participants for the State Compensation Survey (SCS) on behalf of OFM and provide professional level services and support. The results of the SCS are referenced when evaluating pay increases for general government classifications in Washington State.
- (2) The SCS will collect salary data for up to 200 benchmarks, pay practices, and benefit data effective July 1, 2021, using two methods of data collection:
 - A custom SCS with two questionnaires will be used to collect data for a maximum of 60 public sector employer participants
 - In-state public questionnaire, and
 - State government questionnaire.
 - Published Survey Sources will be used to represent Washington State private employers.
- (3) The scope of work includes:
 - Consulting on a variety of compensation & benefit surveying practices
 - Project Management and Communications
 - SCS Database
 - Participant Requirements
 - Benchmark Requirements
 - Published Survey Sources
 - SCS Questionnaires
 - Conducting the SCS
 - Auditing of Database
 - Internal Reports for Employer Analysis
 - Participant Report
 - State Report
 - SCS Conclusion

b. Service Category 2: **Washington State Corrections Compensation Survey (WSCCS)**

- (1) The Contractor shall conduct, audit, analyze, report, and communicate results to participants for the Washington State Corrections Compensation Survey (WSCCS), and provide professional level services and support. The results of this WSCCS will be used to inform collective bargaining and interest arbitration proceedings for approximately 7,300 classified employees.

- (2) The WSCCS will collect salary (minimum, maximum and pay progression), pay practice, and benefit data effective January 1, 2022, using a custom WSCCS tool for up to 50 benchmark jobs from up to 10 public sector employer participants.
- (3) The scope of work includes:
- Project Management and Communications
 - WSCCS Database
 - Participant Requirements
 - Benchmark Requirements
 - WSCCS Questionnaires
 - Conducting the WSCCS
 - Auditing of Database
 - Internal Reports for Employer Analysis
 - Participant Report
 - Arbitration Experience and Specialization
 - WSCCS Conclusion
- c. Service Category 3: **Additional compensation consulting services, such as:**
- Gathering and analysis of health care benefit plan values using Affordable Care Act metal tiers or other actuarial valuation
 - Gathering and analysis of employer contribution rates for defined benefit and defined contribution retirement plans
 - Adjustment of survey data using factors such as cost of living, cost of labor, regional price parity index and currency exchange rates
 - Additional surveys required by legislative mandate or to support State HR initiatives
- d. Work for Service Category 1 or Service Category 2 will not include development of benchmark descriptions, job evaluation or slotting, nor creation or modification of existing job classifications or salary structures.
- e. Service Category 3 will not be scored, but the information is provided to inform Bidders of additional services that may be needed and added as Statements of Work during the Tier 2 process.

1.3 MINIMUM QUALIFICATIONS

Bidders who do not meet these minimum qualifications, will be rejected as non-responsive and will not be evaluated or scored.

Minimum qualifications include:

- a. Bidder must be licensed to do business in the State of Washington or provide a commitment that it will become licensed in Washington within fifteen (15) calendar days of being selected as an Apparent Successful Bidder
- b. Bidders must have consulting experience in conducting compensation and fringe benefit surveys for public and or private employers, including:
 - (1) Consulting on a variety of compensation & benefit surveying practices
 - (2) Project Management and Communications
 - (3) Survey database design

- (4) Survey collection tools such as questionnaires and electronic user interfaces
 - (5) Participant management
 - (6) Job benchmark development and performance feedback
 - (7) Compensation, pay practice and benefit data collection:
 - Conducting custom surveys
 - Use of published surveys
 - Mining data from public web sites
 - Quality control and data calculation audit
 - (8) Monetary geographic adjustment
 - (9) Compilation, analysis and data visualizations of compensation, pay practice and benefit data
 - (10) Internal reports for employer analysis
 - (11) Published participant and other formal reports
 - (12) Consulting on survey best practices, lessons learned and process improvements
- c. Bidders must have the ability to provide a stand-alone database with all collected and compiled data for any survey conducted.

1.4 CONTRACTS

- a. OFM intends to award multiple Convenience Contracts to provide the services described in this RFQ. OFM cannot guarantee that the Contractors will actually receive work off these contracts.
- b. Additional services that are within the scope of this RFQ, as determined by OFM, may be added to the resulting contracts by a written Amendment mutually agreed to and executed by both parties.

1.5 CONTRACTING WITH CURRENT OR FORMER STATE EMPLOYEES

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

1.6 DEFINITIONS

Definitions for the purposes of this RFQ include:

Agency. The Office of Financial Management (OFM) State Human Resources (State HR) division is the agency of the State of Washington that is initiating this RFQ and executing any contract(s) resulting from this RFQ.

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

Bidder. Individual or company interested in the RFQ and that may or does submit a Proposal in order to attain a contract with OFM. Also known as “Proposer.”

Contract. The contract(s) if any, that may result from this RFQ, including all Attachments, Exhibits, Statement(s) of Work, all Amendments, and the Bidder’s response to this RFQ.

Contractor. Individual or company whose proposal has been accepted by OFM and is awarded a fully executed, written contract.

OFM. The Office of Financial Management, including State Human Resources (State HR).

Proposal. A formal offer submitted in response to this RFQ, also known as Bid.

Proposer. Individual or company interested in the RFQ and that may or does submit a proposal in order to attain a contract with OFM. Also known as “Bidder

Request for Qualifications (RFQ). Formal procurement document in which services needed are identified and firms are invited to provide their qualifications to provide the services.

1.7 ADA

OFM complies with the Americans with Disabilities Act (ADA). Bidders may contact the RFQ Coordinator to receive this RFQ in Braille or on tape.

2. GENERAL INFORMATION

2.1 RFQ COORDINATOR

- a. The RFQ Coordinator is the sole point of contact for this procurement. All communication between the Bidder and OFM upon release of this RFQ shall be with the RFQ Coordinator, as follows:

Name	Natalie Eckart
E-Mail Address	ofmprocurements@ofm.wa.gov
Telephone	(360) 790-4823

- b. Any other communication will be considered unofficial and non-binding on OFM and the State of Washington. Communication directed to parties other than the RFQ Coordinator will result in disqualification of the Bidder.
- c. **It is recommended that you request a read receipt whenever sending an email to the RFQ Coordinator to ensure your email was received.**

2.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Qualifications and Quotations	April 9, 2021
Bidder may submit written questions until 3:30 pm Pacific Time	April 23, 2021
OFM will issue responses to Bidder Questions	April 27, 2021
Complaints due	May 11, 2021
Bidder must submit Proposal by 3:30 Pacific Time	May 19, 2021
OFM evaluation of Proposals	May 25, 2021
OFM announces "Apparent Successful Bidders" and begins contract negotiations	May 28, 2021
OFM notifies Unsuccessful Bidders	May 28, 2021
Unsuccessful Bidders may request Debriefing until 3:30 Pacific Time	June 3, 2021
OFM holds Debriefing Conferences, if requested, at the earliest possible date, but no later than	June 7, 2021
Estimated Effective date of Convenience Contracts	June 18, 2021

OFM reserves the right to revise the above schedule.

2.3 QUESTIONS AND ANSWERS

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

2.4 SUBMISSION OF PROPOSALS

- a. The Proposal must be received by the RFQ Coordinator no later than 3:30 pm Pacific Time, Olympia, WA, on **May 19, 2021**.
- b. Scored items are awarded points as part of the evaluation conducted by the evaluation team.
- c. Bidders are required to submit their Proposals as an attachment to an email to the RFQ Coordinator at the email address above, on or before the proposal due date. The Bidder must identify each document and email with the identifier **"RFQ 21-500"** and the Title, **"Washington State Compensation Surveys & Services"**. Attachments to e-mails must be in Microsoft Word or PDF format. Zipped files cannot be received by OFM and cannot be used for submission of proposals.
- d. Proposals may not be transmitted using facsimile transmission.
- e. Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of the OFM and will not be returned.

2.5 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

- a. Proposals submitted in response to this RFQ shall become the property of OFM. All proposals received shall remain confidential until OFM announces the ASB, at which time the proposals shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW).
- b. Any information in the Proposal that the Bidder desires to claim as proprietary and exempt from disclosure under the provisions of Chapter 42.56 RCW, or other state or federal law that provides for the nondisclosure of your document, must be clearly designated. The information must be clearly identified and the particular exemption from disclosure upon which the Bidder is making the claim must be cited. 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.
- c. If a public records request is made for the information that the Bidder has marked as "Proprietary Information," OFM 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, OFM 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, OFM shall maintain the confidentiality of the Bidder information per the court order.

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

2.6 REVISIONS TO THE RFQ

- a. In the event it becomes necessary to revise any part of this RFQ, Amendments will be published on WEBS at <https://fortress.wa.gov/ga/webscust> and on the OFM website at www.ofm.wa.gov. For this purpose, the published questions and answers and any other pertinent information shall be provided as an Amendment to the RFQ and will be placed on the website.
- b. **If you did not receive this RFQ via WEBS, please register with WEBS at the website above in order to receive further notifications.**
- c. OFM also reserves the right to cancel or to reissue the RFQ in whole or in part, prior to execution of a contract.

2.7 ACCEPTANCE OF RFQ TERMS

The Bidder acknowledges that the submission of a proposal which includes a signed Bidder Certification and Assurance Form, attached as Exhibit C, constitutes a binding offer that is valid for 60 days from the due date of proposals.

2.8 RESPONSIVENESS

- a. All proposals will be reviewed by the RFQ Coordinator to determine compliance with administrative requirements and instructions specified in this RFQ. The Bidder is specifically notified that OFM may reject or withdraw a proposal at any time as nonresponsive for any of the following reasons:
 - Incomplete proposal
 - Failure to comply with any part of this RFQ or any exhibit to this RFQ
 - Submission of incorrect, misleading, or false information.
- b. OFM also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

2.9 MOST FAVORABLE TERMS

- a. The State of Washington 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. There will be no best and final offer procedure. The State of Washington does reserve the right to contact a Bidder for clarification of its Proposal.
- b. The ASB(s) should be prepared to accept this RFQ for incorporation into a contract resulting from this RFQ. Contract negotiations may incorporate some or all of the Bidder's Proposal. It is understood that the Proposal will become a part of the official procurement file on this matter without obligation to the State of Washington.

2.10 CONTRACT AND GENERAL TERMS AND CONDITIONS

- a. The ASB(s) will be expected to enter into a contract that will be similar to the Sample Contract, attached as Exhibit G. In no event is a Bidder to submit its own standard contract terms and conditions in response to this solicitation.
- b. The Bidder may submit exceptions as allowed in the Certifications and Assurances form, Exhibit C to this solicitation. All exceptions to the contract terms and conditions must be submitted as Track Changes to Exhibit G, and attached to their Proposal. Bidder must explain the reason for each requested exception, identifying the language in Exhibit G found problematic, the reason Bidders finds the language to be problematic, and any recommended methods/alternate language of mitigating or limiting the perceived negative consequences. Bidder must also explain why each item proposed as a change to a term is in the state's best interest as a customer and how it will support the state's business objectives. Where terms and conditions cannot be changed and may result in negative consequences on the quality of services or their supply, Bidders are required to recommend methods of mitigating or limiting these negative consequences.
- c. OFM will review requested exceptions and accept or reject the same at its sole discretion. Requested exceptions may be grounds for disqualification from further consideration in the award of a Contract, at OFM's discretion.

2.11 COSTS TO PREPARE PROPOSAL

OFM will not be liable for any costs incurred by the Bidder in preparation of a proposal submitted in response to this RFQ or any other activities related to responding to this RFQ.

2.12 NO OBLIGATION TO CONTRACT

This RFQ does not obligate the State of Washington or OFM to contract for services specified herein.

2.13 REJECTION OF PROPOSALS

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

2.14 COMMITMENT OF FUNDS

The Director of OFM, or the Director's delegate, are the only individuals who may legally commit OFM to the expenditures of funds for a contract resulting from this RFQ. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.15 ELECTRONIC PAYMENT

The State of Washington prefers to utilize electronic payment in its transactions. Bidders who are awarded a contract as a result of this RFQ must register in the Statewide Vendor Payee Registration System. OFM maintains a central contractor registration file for Washington State agencies to process Contractor payments. To obtain registration materials and instructions for registration go to <https://ofm.wa.gov/it-systems/accounting-systems/statewide-vendorpayee-services>.

2.16 INSURANCE COVERAGE

- a. The Contractor is to furnish OFM with a certificate of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.
- b. The Contractor shall, at Contractor's own expense, obtain and keep in force insurance coverage, which shall be maintained in full force and effect during the term of the contract. The Contractor shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to OFM within fifteen (15) days of the contract effective date.
- c. Should a Bidder find the following insurance requirements to be overly burdensome, the Bidder should include in its Letter of Submittal a statement substantiating such. If Bidder makes no such statement in the Letter of Submittal, OFM will assume that the Bidder is able to meet the requirements.
- d. **Liability Insurance**
 - (1) Commercial General Liability Insurance: Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the "each occurrence" limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the "each occurrence" limit. CGL insurance shall be written on ISO occurrence from CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insureds (cross liability) condition.
 - (2) Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.
 - (3) Business Auto Policy: As applicable, the Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than \$1,000,000 per accident. Such insurance shall cover liability arising out of "Any Auto." Business auto coverage shall be written on

ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

- e. **Employers Liability (“Stop Gap”) Insurance:** In addition, the Contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.
- f. **Additional Provisions.** The above insurance shall include the following provisions:
 - (1) **Additional Insured.** The State of Washington, OFM, its elected and appointed officials, agents and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the state.
 - (2) **Cancellation.** OFM shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the state 45 days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the state shall be given 10 days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The state shall be given 20 days advance notice of cancellation. If cancellation is due to non-payment of premium, the state shall be given 10 days advance notice of cancellation.
 - (3) **Identification.** Policy must reference the state’s contract number and OFM name.
 - (4) **Insurance Carrier Rating.** All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best’s Reports. Any exception shall be reviewed and approved by the Office of Financial Management Risk Manager, or the Risk Manager for the state of Washington, before the contract is accepted or work may begin. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with Chapter 48.15 RCW and 284-15 WAC
 - (5) **Excess Coverage.** By requiring insurance herein, the state does not represent that coverage and limits will be adequate to protect Contractor, and such coverage and limits shall not limit Contractor’s liability under the indemnities and reimbursements granted to the state in this contract.
- g. **Workers’ Compensation Coverage.** The Contractor will at all times comply with all applicable workers’ compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The state will not be held responsive in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

2.17 COMPLAINT PROCESS

- a. This procedure is available to potential Bidders who are contemplating submitting a bid in response to this RFQ. Only complaints concerning the following subjects shall be considered:
 - A claim that the solicitation unnecessarily restricts competition;
 - A claim the solicitation evaluation or scoring process is unfair or flawed, or
 - A claim the solicitation requirements are inadequate or insufficient to prepare a response.
- b. Bidders complaining about this procurement shall follow the procedures described below. Complaints that do not follow these procedures shall not be considered. If a Bidder registers a complaint against this solicitation, the complaint cannot be raised again during the protest period.
- c. All complaints must be in writing and signed by the complaining party or an authorized Agent. The complaint must be sent to the Procurement Coordinator, or designee, by the date set forth in the Procurement Schedule and must clearly articulate the basis for the complaint. The Bidder submitting the complaint must also include a proposed remedy.
- d. Upon receipt of a complaint, a review will be held by OFM. The OFM RFQ Coordinator will respond to complaints in writing and the OFM director will be notified of all complaints and provided a copy of OFM's response. A copy of the response to the complaint, including any changes to the solicitation, will also be posted to WEBS.
- e. The complaint process does not include an appeal process.

2.18 MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with Chapter 39.19 of the RCW, the State of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of Minority and Women's Business Enterprises participation shall be required as a condition for receiving an award and proposals will not be rejected or considered non-responsive on that basis.

The established annual procurement participation goals for certified **Minority Business Enterprises** is 10% and for certified **Women's Business Enterprises**, 4%, for this type of project. These goals are voluntary. Bidders may contact OMWBE at (360) 753-9693 to obtain information on certified firms.

2.19 ACQUISITION PROCESS

- a. Based upon the two-tier evaluation process described in this document, OFM will create an unranked list of Pre-Qualified Vendors to provide compensation-related services on an as-needed basis.
- b. Tier 1 – Bidders may submit responses based on the requirements of this RFQ. The Pre-Qualified Vendors List will be comprised of the highest-scoring bidders.

The Pre-Qualified Vendors List may be utilized by OFM to select Contractors for work on an as-needed basis. Being awarded a contract through this competition does not guarantee a Contractor will receive work.

c. Tier 2

- (1) As the need for compensation-related services arises, all Contractors on the Pre-Qualified Vendors List for the relevant service category will be invited to submit a response, including a quote, to a second-tier Statement of Work that meets OFM's business requirements at that time.
- (2) OFM will review all responses submitted for consideration and will, in its sole discretion, select Contractor(s) to provide those services for OFM. OFM retains the right to select the most qualified Contractor(s) from the responses received, at its sole discretion. For any given engagement, staff from multiple Contractors may be selected to meet OFM's needs, and Statements of Work will be issued against the selected Contractor's contract at that time.

3. PROPOSAL CONTENTS

The Proposal must be written in English. The two major sections of the Proposal must be submitted in the order below with the same headings. This will not only be helpful to the evaluators of the Proposal, but should assist the Bidder in preparing a thorough response.

3.1. Administrative Requirements (Section 1 of Proposal)

- a. Letter of Submittal. The Letter of Submittal and the attached Certifications and Assurances form (Exhibit C) must be signed and dated by a person authorized to legally bind the Bidder to a contractual relationship, e.g., the president or executive director of a corporation, the managing partner of a partnership, or the proprietor of a sole proprietorship. Signing the Letter of Submittal indicates that the Bidder accepts the terms and conditions of the RFQ. The Letter of Submittal shall contain the following information:
 - (1) Name, address, principal place of business, telephone number, fax number, and e-mail address of the legal entity or the individual with whom the contract would be written.
 - (2) The name and email address of the contact person for this RFQ.
 - (3) Legal status of Bidder (sole proprietorship, partnership, corporation, etc.) and the year the entity was established to do business as it now substantially exists.
 - (4) Name, address, and telephone number of each principal officer (President, Vice-President, Treasurer, Chairperson of the Board of Directors, etc.)
 - (5) Federal Employer Tax Identification number or Social Security number.
 - (6) The Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue. If the Bidder does not have a UBI number, the Bidder must state that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparent Successful Bidder.
 - (7) Location of the facility from which the Bidder would operate.
 - (8) Indicate how many employees are with the firm.
 - (9) Identify any state employees or former state employees employed by the Bidder or on the Bidder's governing board as of the date of the Proposal. Include their position and responsibilities within the Bidder's organization. If following a review of this information, it is determined by OFM that a conflict of interest exists, the Bidder may be disqualified from further consideration for the award of a contract.
 - (10) If the Bidder's staff or subcontractor's staff was an employee of the State of Washington during the past 24 months, or is currently a Washington state employee, identify the individual by name, the agency previously or currently employed by, job title or position held, and separation date.
 - (11) If the Bidder has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Bidder's non-performance or poor performance and the issue of performance was either (a) not litigated due

to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.

- (12) Submit full details of the terms for default, including the other party's name, address, and phone number. Present the Bidder's position on the matter. OFM will evaluate the facts and may, at its sole discretion, reject the Proposal on the grounds of the experience. If no such termination for default has been experienced by the Bidder in the past five years, so indicate.
 - (13) A list of all RFQ Amendments downloaded by the Bidder from WEBS and listed in order by Amendment number and date. If there are no RFQ Amendments, the Bidder must include a statement to that effect.
 - (14) A statement substantiating that the person who signs the letter is authorized to contractually bind the Bidder's firm.
 - (15) A statement substantiating that the Bidder meets all the Minimum Qualifications as listed in **Minimum Qualifications** Section.
 - (16) Identification of the page numbers on the Bidder's Proposal that are marked "Proprietary Information".
- b. Bidder Certification and Assurances Form. Bidders must submit a completed Bidder Certification and Assurances Form, Exhibit C. Please sign and include any attachments that are necessary. Failure to submit a signed Certification and Assurances Form will result in disqualification.
 - c. Wage Theft Certification. Bidders must submit a completed and executed Wage Theft Certification Form, Exhibit D. Failure to submit will result in disqualification.
 - d. Executive Order 18-03 Contractor Certification (5 points). Bidders must submit a completed and executed Executive Order 18-03 Certification Form, Exhibit E. Failure to submit will result in disqualification.
 - e. OMWBE Certification. If you are certified as a minority-owned firm and/or women-owned firm, include proof of certification issued by the Washington State Office of Minority and Women's Business Enterprises (OMWBE).
 - f. Veteran's Certification. If you are certified as a veteran-owned firm include proof of certification issued by the Washington State Department of Veterans Affairs.
 - g. References. List names, addresses, telephone numbers, and e-mail addresses of three (3) business references for the Bidder and three (3) business references for the lead staff person for whom work has been accomplished and briefly describe the type of service provided. Do not include current OFM staff as references. By submitting a proposal in response to this RFQ, the Bidder and team members grant permission to OFM to contact these references and others, who from OFM's perspective, may have pertinent information. OFM may or may not, at OFM's discretion, contact references. OFM may evaluate references at OFM's discretion.
 - h. Identification of Services Being Bid. Bidder is to identify whether they are bidding on Service Category 1, 2, or both. Bidders are not required to bid on both Service Categories.

3.2. **Service Category 1 Qualifications (Section 2 of Proposal)**

General Requirements: This section of the Proposal must contain information that will demonstrate to the evaluation committee the Bidder's understanding of the types of services proposed, the Bidder's ability to accomplish them, and the ability to meet tight timeframes. This section must also demonstrate the capabilities of the Bidder's staff to perform the services.

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

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

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

a. **Experience (65 points)**

- (1) Provide a brief overview of your firm (20 points)
- (2) Outline your staff's relevant work experience and credentials. Include years of experience conducting compensation and benefit surveys and or managing compensation and benefit survey projects. (45 points)

b. **Compensation and Fringe Benefit Survey Experience (44 points)**

- (1) Outline your firm's experience conducting compensation and benefit plan surveys including salary and benefit cost analyses, especially for local government entities and entities in high cost of living areas. (10 points)
- (2) Describe services, capabilities, designations or experience that distinguishes your organization from the competition. (5 points)
- (3) Within the last five (5) years, describe relevant experience related to conducting compensation surveys, including: (20 points)
 - a) Private and public sector surveys conducted
 - b) Largest number of benchmarks included in a survey
 - c) Largest number of participants included in a survey
 - d) Pay practices surveyed
 - e) Fringe benefits surveyed
 - f) Adjustment of survey data using factors such as cost of living, cost of labor, regional price parity index and currency exchange rates
 - g) Conducting quality assurance for custom survey data, published survey data and data mined from public web sites
 - h) Analyses of employer market position, internal employee group relationships, market sector relationships
 - i) Production of internal analysis reports
 - j) Production and publication of formal survey reports

(4) Provide a list of relevant survey data available in the Bidder's survey library for use in contract work for OFM. Include data source vendor, title and data effective date. (9 points)

c. Survey Database Experience (23 points)

- (1) Within the last five (5) years, describe relevant experience creating databases for compensation and benefit surveys. (10 points)
- (2) Can you provide a stand-alone survey database in MS Excel as described in the Scope of Work for the Service Category? If not, what software platform would be used to create the survey database deliverable in the Scope of Work? (5 points)
- (3) Provide sample audit methods for the following: (4 points)
 - a) Raw data
 - b) Data calculations.
- (4) Provide data visualization examples for: (4 points)
 - a) Survey participation
 - b) Benchmark result
 - c) Employer overall position to market
 - d) Pay practice result

d. Health Care and Retirement Benefit Analyses (16 points)

- (1) Within the last five (5) years, describe your expertise and experience comparing health care benefit plan values using employer contributions, Affordable Care Act metal tiers, and or other actuarial valuation methods. (8 points)
- (2) Within the last five (5) years, describe your expertise and experience comparing defined benefit and defined contribution retirement plans using employer contribution rates and/or other actuarial valuation methods. (8 points)

3.3. **Service Category 2 Qualifications (Section 3 of Proposal)**

General Requirements: This section of the Proposal must contain information that will demonstrate to the evaluation committee the Bidder's understanding of the types of services proposed, the Bidder's ability to accomplish them, and the ability to meet tight timeframes. This section must also demonstrate the capabilities of the Bidder's staff to perform the services.

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

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

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

a. **Experience (65 points)**

- (1) Provide a brief overview of your firm (20 points)
- (2) Outline your staff's relevant work experience and credentials. Include years of experience conducting compensation and benefit surveys and or managing compensation and benefit survey projects. (45 points)

b. **Compensation and Fringe Benefit Survey Experience (35 points)**

- (1) Outline your firm's experience conducting compensation and benefit plan surveys including salary and benefit cost analyses, especially for local government entities and entities in high cost of living areas. (10 points)
- (2) Describe services, capabilities, designations or experience that distinguishes your organization from the competition. (5 points)
- (3) Within the last five (5) years, describe relevant experience related to conducting compensation surveys, including: (20 points)
 - a) Private and public sector surveys conducted
 - b) Largest number of benchmarks included in a survey
 - c) Largest number of participants included in a survey
 - d) Pay practices surveyed
 - e) Fringe benefits surveyed
 - f) Adjustment of survey data using factors such as cost of living, cost of labor, regional price parity index and currency exchange rates
 - g) Conducting quality assurance for custom survey data, published survey data and data mined from public web sites
 - h) Analyses of employer market position, internal employee group relationships, market sector relationships
 - i) Production of internal analysis reports
 - j) Production and publication of formal survey reports

c. Survey Database Experience (23 points)

- (1) Within the last five (5) years, describe relevant experience creating databases for compensation and benefit surveys. (10 points)
- (2) Can you provide a stand-alone survey database in MS Excel as described in the Scope of Work for the Service Category? If not, what software platform would be used to create the survey database deliverable in the Scope of Work? (5 points)
- (3) Provide sample audit methods for the following: (4 points)
 - a) Raw data
 - b) Data calculations.
- (4) Provide data visualization examples for: (4 points)
 - a) Survey participation
 - b) Benchmark result
 - c) Employer overall position to market
 - d) Pay practice result

d. Health Care and Retirement Benefit Analyses (16 points)

- (1) Within the last five (5) years, describe your expertise and experience comparing health care benefit plan values using employer contributions, Affordable Care Act metal tiers, and or other actuarial valuation methods. (8 points)
- (2) Within the last five (5) years, describe your expertise and experience comparing defined benefit and defined contribution retirement plans using employer contribution rates and or other actuarial valuation methods. (8 points)

e. Interest Arbitration Experience (30 points)

Within the last five (5) years, describe relevant experience related to:

- (1) Development of rebuttal strategy. (10 points)
- (2) Preparation of reports and exhibits. (5 points)
- (3) Delivering expert witness testimony. (15 points)

4. EVALUATION AND SELECTION

4.1. EVALUATION PROCEDURE

- a. Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any Amendments issued. The evaluation of proposals shall be accomplished by an evaluation team to be designated by OFM, which will determine the highest-scoring Bidders for selection as Apparent Successful Bidders that will make up the Pre-Qualified Vendors List.
- b. The RFQ Coordinator reserves the right to contact the Bidders for clarification of any portion of the Bidder's Proposal.

4.2. PROCUREMENT EVALUATION FOR EXECUTIVE ORDER 18-03 (FIRMS WITHOUT MANDATORY ARBITRATION FOR EMPLOYEE)

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, OFM will evaluate bids for best value and provide a bid preference of **5 points** to any bidder who certifies, pursuant to the certification attached as *Exhibit E – Contractor Certification for Executive Order 18-03 – Workers' Rights*, 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.

4.3. SCORING

- a. The following are the maximum points that will be assigned to the Proposals for bid evaluation purposes per Service Category:

Service Category 1	Maximum Points
Experience	65
Compensation and Fringe Benefit Survey Experience	44
Survey Database Experience	23
Health Care and Retirement Benefit Analyses	16
Executive Order 18-03	5
Total Maximum Points	153

Service Category 2	Maximum Points
Experience	65
Compensation and Fringe Benefit Survey Experience	35
Survey Database Experience	23
Health Care and Retirement Benefit Analyses	16
Interest Arbitration Experience	30
Executive Order 18-03	5
Total Maximum Points	174

- b. Each evaluator will score each criteria separately. The scores of all the evaluators from each criteria will be averaged to determine the Bidder's score for

that criteria. Then the scores for all the criteria will be added together to determine the Bidder's total score per Service Category.

- c. OFM reserves the right to award the contracts to the Bidders whose Proposals are deemed to be in the best interest of OFM and the State of Washington.

4.4. FINAL DETERMINATION OF APPARENT SUCCESSFUL BIDDERS

- a. OFM program staff and/or management may conduct a final review of the evaluation and scoring of finalist(s).
- b. In this final review, OFM may consider past or current performance of any OFM contracts by a finalist(s), and any experience of the program or OFM in working with a finalist(s) under any past or current contract with OFM.
- c. In doing so, OFM management shall be guided, but not bound, by the scores awarded by the evaluators. Program staff and OFM management shall determine which Proposals reviewed during this final selection process will best meet the needs of OFM and, specifically, the needs of OFM.
- d. Any Bidder who would be an ASB based on the scores awarded by the evaluators, and who is not selected, shall be provided, upon request, the reasons why OFM selected a Bidder with a lower final score.

4.5. NOTIFICATION TO BIDDERS

OFM will notify the ASBs of their selection by e-mail upon completion of the evaluation process. Individuals or firms whose Proposals have not been selected as an ASB will be notified separately by e-mail.

4.6. DEBRIEFING OF UNSUCCESSFUL BIDDERS

- a. Any Bidder who has submitted a proposal and been notified that they were not selected as an ASB may request a debriefing. The request for a debriefing conference must be **received** by the RFQ Coordinator no later than 3:30 PM, local time, Olympia, Washington, on the date set forth in the Procurement Schedule.
- b. Discussion at the debriefing conference will be limited to the following:
 - Evaluation and scoring of the Bidder's Proposal;
 - Critique of the requesting Bidder's Proposal based on the evaluation; and
 - Review of Bidder's final score in comparison with other final scores without identifying the other firms.
- c. 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 one (1) hour.

4.7. PROTEST PROCEDURE

Protests may be made only by Bidders who submitted a response to this RFQ and participated in a debriefing conference. Upon completing the debriefing conference, the Bidder is allowed five (5) business days to file a protest of the RFQ with the RFQ Coordinator. Protests must be received by the RFQ Coordinator no later than 5:00

pm, local time in Olympia, Washington on the fifth business day following the debriefing. Protests may be submitted by e-mail.

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

All protests must be in writing, addressed to the RFQ Coordinator, and signed by the protesting party or an authorized Agent. The protest must state the RFQ number, the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of an evaluator;
- Errors in computing the score;
- Non-compliance with procedures described in the RFQ or OFM policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, or 2) OFM's assessment of its own and/or other agencies needs or requirements.

Upon receipt of a protest, a protest review will be held by OFM. The OFM Director or an employee delegated by the Director who was not involved in the procurement will consider the record and all available facts and issue a decision within five (5) business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Bidder that also submitted a proposal, such Bidder will be given an opportunity to submit its views and any relevant information on the protest to the RFQ Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold OFM's action; or
- Find only technical or harmless errors in OFM's procurement process and determine OFM to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide OFM options, which may include:
 - Correct the errors and re-evaluate all proposals, and/or
 - Reissue the solicitation document and begin a new process, or
 - Make other findings and determine other courses of action as appropriate.

If OFM determines that the protest is without merit, OFM will enter into contracts with the Apparent Successful Bidders. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

5. RFQ EXHIBITS

- Exhibit A Scope of Work
- Exhibit B Overview of Washington State Class Plan and Compensation Structures
- Exhibit C Certifications and Assurances
- Exhibit D Wage & Theft Certification
- Exhibit E Executive Order 18-03 Certification
- Exhibit F Office of Financial Management Style, Design and Graphics Guidelines for Vendors
- Exhibit G Sample Contract & General Terms and Conditions

Exhibit A Scope of Work

Service Category 1: Washington State Compensation Survey (SCS)

The CONTRACTOR shall conduct, audit, analyze, report, and communicate the State Compensation Survey (SCS) and provide professional level services and support. The results of this SCS are referenced when evaluating pay increases for general government classifications in Washington State.

The SCS will collect salary data for up to 200 benchmarks, pay practice, and benefit data effective July 1, 2021, using two methods of data collection:

1. A custom SCS with two questionnaires will be used to collect data for a maximum of 60 public sector employers (Participants):
 - In-state public questionnaire, and
 - State government questionnaire.
2. Published Survey Sources will be used to represent Washington state private employers.

The CONTRACTOR shall perform the following Scope of Work:

1. **Project Management and Communications.** To provide the most comprehensive services and products to all stakeholders, the CONTRACTOR is required to perform the following functions:
 - 1.1. Provide a proposed project management plan (to be approved by OFM) and all subsequent versions as updates occur to OFM and all parties of the Account Team. The project management plan shall include but not be limited to deliverables and due dates; who is responsible to meet those deadlines; completion status; and issues encountered, and lessons learned;
 - 1.2. Provide, by teleconference, weekly updates to OFM to include but not be limited to: overall SCS progress including what is going well and what needs attention; overall participation; and a discussion of key issues (if not already addressed) or status of actions taken to address previously identified issues;
 - 1.3. Provide a journal recording major daily activities such as decisions made, rationale for decisions made that differ from stated methodologies for data collection and analysis, lessons learned, issues encountered, resolution steps taken, outcomes, etc.). Provide journal to OFM before each status session and in final form within two (2) business days after each status session. The journal in final form is to be provided to the OFM at the end of the contract; and
 - 1.4. Send SCS communications to Participants informing them on the SCS release date, response instructions, timeframes/due dates, reminders, receipt of Participant responses, response clarifications, and any technical support issues. CONTRACTOR shall send a pre-survey communication (to be approved by OFM) to inform Participants the CONTRACTOR is conducting the SCS on behalf of Washington State. The CONTRACTOR shall distribute the Participant Report to Participants.

2. **Database.** The CONTRACTOR shall develop and maintain a Database to house all SCS responses, data calculations, data analysis, infographics, and reports (to be approved by OFM). The CONTRACTOR shall be responsible for, but not limited to, the following by the date indicated in the Statement of Work:
 - 2.1. The Database must be formatted in Microsoft 2016 Excel or similar program that is compatible with Microsoft Office 365 Apps for enterprise;
 - 2.2. The Database must include all Participant and published data collected (see the SCS Questionnaire section below);
 - 2.3. The Database must be programmed to automatically Audit and/or detect erroneous information by Participants as one step in the Auditing of data (see auditing section below);
 - 2.4. The Database must stand alone (e.g. only house SCS data) so that it can be provided to OFM at the completion of the Statement of Work;
 - 2.5. The Database must not be proprietary or include proprietary functions or formulas that cannot be accessed by OFM;
 - 2.6. The Database must house all analysis reports (see Internal Reports for Analysis section below);
 - 2.7. The Database must house all data analysis and infographics created for published reports (see Participant and State Reports section below); and
 - 2.8. At the conclusion of the SCS project, CONTRACTOR shall transfer the Database to OFM with documentation to assist OFM in using the Database.
3. **Participant Requirements.** OFM shall provide a SCS Participant list to the CONTRACTOR with a maximum of 60 employers to be surveyed. The CONTRACTOR shall contribute to positive relationship building with all parties involved. CONTRACTOR shall be responsible for, yet not limited to, the following by the date indicated in the Statement of Work:
 - 3.1. Identifying and including other appropriate Participants;
 - 3.2. Confirming and updating all contact information for Participants;
 - 3.3. Ensuring Participant employers' timely and accurate participation;
 - 3.4. Making clear distinctions between each Participant and their responses; and
 - 3.5. Conducting themselves in a professional and courteous manner as to prevent damaging any relationships OFM has created with Participants.
4. **Benchmark Requirements.** OFM shall provide up to 200 Benchmarks with descriptions. The CONTRACTOR shall be responsible for, yet not limited to, the following by the date indicated in the Statement of Work:
 - 4.1. Notifying OFM of any Benchmarks showing low participation;
 - 4.2. Researching and collecting publicly available data missing from submitted questionnaires and for Participants that decline or fail to respond;
 - 4.3. Providing OFM with all data received through Participant response for all Benchmarks with low participation prior to the close of data collection;
 - 4.4. Providing OFM a list of Benchmarks with less than five (5) combined Participant and Published Survey Source matches prior to the close of data collection; and

4.5. Ensuring that Participants have matched their job descriptions to the SCS Benchmark description, not the SCS Benchmark title.

5. **Published Survey Sources.** Published Survey Sources will be the source of private employer salary, pay practice and benefit data. The CONTRACTOR shall be responsible for, yet not limited to, the following by the dates set forth in the Statement of Work Deliverables and Due Dates section:

5.1. OFM shall provide access to Published Survey Sources in the OFM's survey library for inclusion in the SCS;

5.2. CONTRACTOR shall identify credible Published Survey Sources available in the CONTRACTOR's library for inclusion in the SCS (to be approved by OFM) based on the following criteria:

5.2.1. A significant number of private sector Participants within Washington State;

5.2.2. The estimated number of benchmark matches based on a review of the Published Survey Source job titles compared to the SCS benchmarks; and

5.2.3. The inclusion of salary, pay practice and benefit data listed in subsection 6.0 SCS Questionnaires.

6. **SCS Questionnaires.**

6.1. OFM shall provide two (2) custom SCS Questionnaire templates with up to five sub-categories: organizational characteristics, pay plans and practices, incentives and perquisites, benefits, and benchmark compensation practices:

- In-state public employers; and
- State government employers.

6.2. The CONTRACTOR shall evaluate the questionnaires on the clarity of instructions and questions and ease of navigation and response, and in consideration of published data formats. CONTRACTOR shall be responsible for, yet not limited to finalizing the following (in consultation with OFM) by the date indicated in the Statement of Work:

6.3. SCS instructions:

6.3.1. Cover page with identifiers and CONTRACTOR contact information;

6.3.2. Employer information including point of contact and contact information;

6.3.3. Overview/introduction;

6.3.4. Instructions (how to fill out, how to submit responses, help, etc.);

6.3.5. Terms and definitions;

6.3.6. Comment/explanation section for each question;

6.4. Organizational characteristics:

6.4.1. Industry information;

6.4.2. Washington geographic information (In-State questionnaire only);

6.4.3. Right-to-Work-State (Out-of-State questionnaire only);

6.4.4. Number of employees;

6.4.5. Percentage of workforce that is represented;

- 6.4.6. Standard full-time work schedule (e.g., 40 hours, 32 hours);
- 6.4.7. Percentage of workforce that has a compressed workweek schedule;
- 6.4.8. Percentage of workforce that has a flextime schedule;
- 6.4.9. Percentage of workforce that teleworks;
- 6.4.10. Annual turnover percentage;
- 6.5. Compensation practices:
 - 6.5.1. Movement through pay structure (step and/ or merit/performance-based increases);
 - 6.5.2. Amount and frequency of structure adjustments;
 - 6.5.3. Wage adjustment factors, e.g., cost of labor, increases not tied to a specific economic indicator, Cost-of-Living-Adjustment (COLA), geographic factors;
 - 6.5.4. Overall average salary budget increase percentage;
 - 6.5.5. Shift differential (evening, night, weekend);
 - 6.5.6. Stand-by pay or on-call pay;
 - 6.5.7. Call-back pay;
 - 6.5.8. Performance based (merit) pay;
 - 6.5.9. Other incentive pay;
 - 6.5.10. Social Security;
- 6.6. Benefits:
 - 6.6.1. Retirement plans:
 - 6.6.1.1. Defined benefit retirement plan types available to new employees;
 - 6.6.1.1.1. Plan name;
 - 6.6.1.1.2. Normal or typical retirement age;
 - 6.6.1.1.3. Defined Benefit Multiplier (for example, 2%; this multiplier is typically used in a formula to determine a monthly benefit, e.g. Multiplier * Service Credit Years * Average Final Compensation = Monthly Benefit);
 - 6.6.1.1.4. Typical annual cost of living adjustment increase;
 - 6.6.1.1.5. Cost sharing split between employer and employee (for example, 50%/50%);
 - 6.6.1.2. Hybrid retirement plan types (defined benefit with defined contribution component) available to new employers;
 - 6.6.1.2.1. Plan name;
 - 6.6.1.2.2. Normal or typical retirement age;
 - 6.6.1.2.3. Defined Benefit Multiplier (for example, 2%; this multiplier is typically used in a formula to determine a monthly benefit, e.g. Multiplier * Service Credit Years * Average Final Compensation = Monthly Benefit);
 - 6.6.1.2.4. Typical annual cost of living adjustment increase;
 - 6.6.1.2.5. Employer defined contribution percent or amount (if applicable);

- 6.6.1.2.6. Maximum salary basis—maximum salary that the employer matches or limits contribution;
 - 6.6.1.2.7. Cost sharing split between employer and employee (for example, 50%/50%);
 - 6.6.1.3. Defined contribution plan:
 - 6.6.1.3.1. Plan name;
 - 6.6.1.3.2. Employer defined contribution percent or amount (if applicable);
 - 6.6.1.3.3. Maximum salary basis—maximum salary that the employer matches or limits contribution;
 - 6.6.1.3.4. Additional employer defined contribution;
- 6.6.2. Fringe benefits:
 - 6.6.2.1. Performance based pay;
 - 6.6.2.2. Longevity pay;
 - 6.6.2.3. Other incentive pay;
 - 6.6.2.4. Relocation assistance for new hires;
 - 6.6.2.5. Transportation or commuting assistance;
 - 6.6.2.6. Employer sponsored online learning;
 - 6.6.2.7. Employer facilitated inter-disciplinary groups;
 - 6.6.2.8. Tuition assistance or reimbursement;
 - 6.6.2.9. Student loan deferral, repayment; or forgiveness program
 - 6.6.2.10. Reimbursement for membership dues to job-related professional associations;
 - 6.6.2.11. Reimbursement for fees associated with certification/licensing attainment or maintenance;
- 6.7. Paid time off:
 - 6.7.1. Paid vacation/paid time off (annual number of hours granted for years 1 to 20 and maximum);
 - 6.7.2. Sick leave (annual number of hours granted for years 1 to 20 years and maximum);
 - 6.7.3. Holidays (number of days granted per year);
 - 6.7.4. Other paid leave;
 - 6.7.5. Leave buy-out and/or carry-over options;
- 6.8. In-state benchmark compensation:
 - 6.8.1. Participant job title (indicator for no match);
 - 6.8.2. Participant position description compatibility level (matching to benchmark description, not benchmark title);
 - 6.8.3. Standard number of hours per pay cycle for a full-time employee;
 - 6.8.4. Annual salary range minimum and maximum;
- 6.9. State government benchmark compensation;
 - 6.9.1. Participant Job Title (indicator for no match);
 - 6.9.2. Participant Position Description Compatibility Level (matching to benchmark description, not benchmark title);

- 6.9.3. Standard number of hours per pay cycle for a full-time employee;
 - 6.9.4. Annual salary range minimum and maximum;
 - 6.10. Pre-populate targeted Participant SCS Questionnaires with 2018 benchmark match titles, if applicable; and
 - 6.11. If changes are made to the format, questions or response content of the in-state and state government SCS Questionnaires, CONTRACTOR shall provide final versions to OFM for review and approval prior to distributing them to targeted organizations.
- 7. Conducting the SCS.** To provide an accurate and comprehensive SCS, the CONTRACTOR shall be responsible for, yet not limited to, the following by the date indicated in the Statement of Work:
- 7.1. Communicating and coordinating announcements to Participants, respond to Participant inquiries; and release of SCS results;
 - 7.2. Obtaining OFM's written approval of the final SCS questionnaires prior to distribution;
 - 7.3. Obtaining OFM's written approval on Published Survey Sources to be used for the SCS;
 - 7.4. Obtain OFM's written approval on any additional targeted organizations;
 - 7.5. Researching and collecting publicly available data missing from submitted questionnaires and for targeted organizations that decline to respond;
 - 7.6. Entering Participant responses into the Database;
 - 7.7. Entering Published Survey Source match data into the Database;
 - 7.8. Consulting with OFM on SCS best practices and methodologies that are defensible; and mutually agreed upon, e.g. aging data, data analysis, how to analyze and represent Published Survey Sources and custom SCS responses; and
 - 7.9. Integrating and auditing the Participant and Published Survey Source responses within the Database for analysis and reporting.
- 8. Auditing of Database.** All data collected will be effective July 1, 2021. CONTRACTOR shall check and evaluate all data submitted by Participants and all Database entries on an on-going basis to include, but not be limited to, responses that are confusing, high/low, text in number field, number in text field, unrecognized symbols, acronyms, and blank fields. CONTRACTOR will contact Participant for clarification, if applicable, and document who (name/position) and what date, provided that clarification. In addition to the above, CONTRACTOR is required to make clear associations between the Participant and the questions they respond to which includes the data provided for each. CONTRACTOR shall provide a draft and final Audit of the following to OFM for approval by the date noted above:
- 8.1. Benchmarks
 - 8.1.1. Incorrect title/matching to the Benchmark description; and
 - 8.1.2. Low Participation matches.
 - 8.2. Benefits—when information appears abnormally high/low compared to other Participant data;
 - 8.3. Salary data—verification of the salary provided by Participants compared to other Participant responses and Published Survey Sources;

9. **Internal Reports for Analysis.** OFM will require a set of general reports. The CONTRACTOR shall develop, analyze, and provide OFM with error-free drafts and final reports formatted in accordance with those listed below:
 - 9.1. Aggregate of SCS results for the data listed in the SCS Questionnaires section above with data cuts by:
 - 9.1.1. Participant type;
 - 9.1.2. Sector;
 - 9.1.3. Industry;
 - 9.1.4. Location;
 - 9.2. SCS participation:
 - 9.2.1. Number of Participants contacted;
 - 9.2.2. List Participants that declined to participate;
 - 9.2.3. List of Participants that submitted data;
 - 9.2.4. Percentage of Participants submitting data compared to number contacted;
 - 9.2.5. Percentage of Participants grouped by industry;
 - 9.3. Number of Participant and Published Survey Source matches per Benchmark, listed separately and the combined total;
 - 9.4. List of failed Benchmarks;
 - 9.5. Benchmark position to SCS result;
 - 9.6. Percent needed for Benchmark to reach the SCS result;
 - 9.7. Detailed market data by benchmark job; and
 - 9.7.1. WA market position overall.
10. **Participant Report and State Report.** The CONTRACTOR shall create a Participant Report and a State Report for review and approval by OFM. The OFM will provide copies of the 2020 reports as sample formatting. The Participant Report and State Report must be formatted in accordance with the Office of Financial Management Style, Design and Graphics Guidelines for Vendors per Exhibit F. The complimentary Participant Report will include the custom SCS results. The State Report will include the custom SCS results combined with the Published Survey Source results, and additional information provided by OFM. The Participant Report and State Report shall include, but are not limited to the following, by the date noted above:
 - 10.1. Background and methodology;
 - 10.2. Organizational characteristics;
 - 10.3. Compensation practices;
 - 10.4. Benefits;
 - 10.5. Paid leave practices;
 - 10.6. Benchmark Pay Ranges;
 - 10.7. List of SCS Participants; and
 - 10.8. Benchmark job descriptions.

11. **SCS Conclusion.** At the conclusion of the work described in the Statement of Work, CONTRACTOR shall participate in a final meeting which participation includes:
 - 11.1. Providing all materials related to the SCS to OFM. This includes activity logs, all internal/external reports, all SCS related data, SCS Database in Microsoft 2016 Excel or similar program, SCS Questionnaires in Excel;
 - 11.2. Knowledge transfer (provide training on SCS results and Database functions);
 - 11.3. Discussion of lessons learned, best practices;
 - 11.4. Discussion of questions related to the SCS (data collection, reports, and general information); and
 - 11.5. CONTRACTOR will identify a point of contact for follow up communications with OFM.

12. **OFM Roles and Responsibilities.** OFM roles and responsibilities include, but shall not be limited to:
 - 12.1. Provide SCS methodologies;
 - 12.2. Provide Benchmark titles and descriptions;
 - 12.3. Provide Participant List;
 - 12.4. Provide draft SCS Questionnaires;
 - 12.5. Provide access to the 2020 SCS database;
 - 12.6. Provide SCS data for State of Washington;
 - 12.7. Provide access to Published Surveys in OFM's survey library;
 - 12.8. Provide job matches for Published Surveys in OFM's survey library;
 - 12.9. Provide 2020 Participant Benchmark match titles;
 - 12.10. Provide copies of the 2020 Participant and State Reports;
 - 12.11. Provide supplemental data for inclusion in the State Report;
 - 12.12. Meet regularly with the CONTRACTOR for status updates and Q&A's;
 - 12.13. Review and approve proposed project management plan/communication strategies;
 - 12.14. Review and approve Published Surveys from the CONTRACTOR's survey library to be used in the SCS;
 - 12.15. Review and approve final SCS Questionnaires, Participant Report, State Report and Internal Reports for Analysis prior to release; and
 - 12.16. Review and approve proposed changes as outlined below.

Service Category 2: Washington State Corrections Compensation Survey (WSCCS)

The CONTRACTOR shall conduct, audit, analyze, report, and communicate the Washington State Corrections Compensation Survey (WSCCS), and provide professional level services and support. The results of this WSCCS will be used to inform collective bargaining and interest arbitration proceedings for approximately 7,300 classified employees.

The WSCCS will collect salary data for up to 50 benchmark jobs, pay practice, and benefit data effective January 1, 2022. A custom WSCCS tool will be used to collect data for up to 10 public sector employers (Participants).

The CONTRACTOR shall perform the following Scope of Work:

1. **Communications/Project Management.** To provide the most comprehensive services and products to all stakeholders, the Contractor is required to perform the following functions:
 - 1.1 Provide a proposed project management plan (to be approved by OFM) and all subsequent versions as updates occur, to the State and all parties of the Account Team. The project management plan shall include but not be limited to: Deliverables and due dates; who is responsible to meet those deadlines; completion status, and lessons learned/issues encountered.
 - 1.2 Provide, by teleconference, weekly updates to OFM to include but not be limited to: overall WSCCS progress including what is going well and what needs attention; overall participation; and a discussion of key issues (if not already addressed) or status of actions taken to address previously identified issues.
 - 1.3 Provide a journal recording major daily activities such as decisions made, rationale for decisions made that differ from stated methodologies for data collection and analysis, lessons learned, issues encountered, resolution steps taken, and outcomes. Provide journal to OFM in draft form before each status session and in final form within two (2) business days after each status session. The journal in final form is to be provided to OFM at the end of this contract; and
 - 1.4 The Contractor shall send WSCCS communications to Participants informing them on the WSCCS release date, response instructions, timeframes/due dates, reminders, receipt of Participant responses, and any technical support issues. The Contractor will provide a draft letter to be sent by OFM to inform WSCCS participants that the WSCCS is being conducted on behalf of Washington State.
2. **Database.** The CONTRACTOR shall develop and maintain a Database to house all WSCCS responses, data calculations, data analysis, infographics, and reports (to be approved by OFM). The CONTRACTOR shall be responsible for, but not limited to, the following by the date noted above:
 - 2.1. The Database must be formatted in Microsoft 2016 Excel or similar program that is compatible with Microsoft Office 365 Apps for enterprise;
 - 2.2. The Database must include all Participant data collected (see the WSCCS Questionnaire section below);
 - 2.3. The Database must be programmed to automatically Audit and/or detect erroneous information by Participants as one step in the Auditing of data (see auditing section below);
 - 2.4. The Database must stand alone (e.g. only house WSCCS data) so that it can be provided to OFM at the completion of the Statement of Work;

- 2.5. The Database must not be proprietary or include proprietary functions or formulas that cannot be accessed by OFM or that cannot be disclosed during an interest arbitration hearing;
 - 2.6. The Database must house all analysis reports (see Internal Reports for Analysis section below);
 - 2.7. The Database must house all data analysis and infographics created for published reports (see Participant and State Reports section below); and
 - 2.8. At the conclusion of the WSCCS project, CONTRACTOR shall transfer the Database to OFM with documentation to assist OFM in using the Database.
3. **Participant Requirements.** OFM has a Participant list for the WSCCS that will be provided to the Contractor. OFM estimates a maximum of 10 public employers will be surveyed. OFM expects the Contractor will contribute to positive relationship building with all parties involved. The Contractor will be responsible for, yet not limited to, the following:
- 3.1. Identifying and including other appropriate participants;
 - 3.2. Confirming and updating all contact information of the Participants;
 - 3.3. Ensuring Participant employers timely and accurate participation;
 - 3.4. Making clear distinctions between each Participant and their responses.
 - 3.5. Collecting all Collective Bargaining Agreements and/or memorandum of understandings from each Participant; and
 - 3.6. Conducting themselves in a professional and courteous manner as to prevent damaging any relationships the State of Washington has created with WSCCS Participants.
4. **Benchmark Requirements.** OFM will provide up to 50 benchmarks with descriptions. The Contractor will be responsible for, yet not limited to:
- 4.1. Notifying OFM of any Benchmarks showing low participation;
 - 4.2. Providing OFM with all data received through Participant responses for all Benchmarks with low participation prior to the close of data collection;
 - 4.3. Ensuring that low participating benchmark data has been requested and collected through Public Disclosure and/or through CBAs/MOUs and is incorporated/corrected in the database, where appropriate;
 - 4.4. Ensuring that Participants have matched their job descriptions to the WSCCS benchmark description, not the WSCCS benchmark title.
5. **WSCCS Questionnaire.** The Contractor shall modify the 2020 WSCCS questionnaire to accommodate requested changes and gain approval from OFM. OFM and the Contractor collaborate to determine the best language for the questionnaire. In addition to checking the information in this section, OFM will be evaluating the clarity of the questions asked in the questionnaire, as well as the ease of response. The questionnaire shall incorporate all data elements requested by OFM, including but not limited to the following:
- 5.1. Cover page with identifiers and Contractor contact information;
 - 5.2. Employer information, point of contact, and contact information;
 - 5.3. Overview/Introduction/background of WSCCS (to be provided by OFM);
 - 5.4. Instructions (how to fill out, how to submit responses, how to get help, etc.);

- 5.5. Terms and definitions (to be provided by OFM);
- 5.6. Benchmark titles and descriptions (to be provided by OFM);
- 5.7. Whether represented or non-represented;
- 5.8. Contract term;
- 5.9. General wage increases scheduled for term of contract, and for any pending CBAs/MOUs at the time of the WSCCS, collect updated general wage increases as these are settled;
- 5.10. Salary schedules, showing progression steps and/or longevity;
- 5.11. Standard work schedule (regularly scheduled hours per work week/month/year);
- 5.12. Pay practices (aka Premium, Specialty Pay, Assignment Pay):
 - 5.12.1. Longevity Pay
 - 5.12.2. Geographic Pay
 - 5.12.3. Certification Premium
 - 5.12.4. Dual Language Pay
 - 5.12.5. Miscellaneous
 - 5.12.5.1. Overtime Pay
 - 5.12.5.2. Shift Differential
 - 5.12.5.3. Standby Pay
 - 5.12.5.4. Call Back Pay
 - 5.12.5.5. Fitness Incentive
 - 5.12.5.6. Uniform Allowance
 - 5.12.5.7. Cleaning Allowance
 - 5.12.5.8. Call Back Pay
 - 5.12.5.9. Relocation Assistance
 - 5.12.5.10. Meals
 - 5.12.5.11. Specialty Teams Assignment Pay
 - 5.12.6. Any other pay practices that are unique to the corrections function, such as prison premium or hazard pay.
- 5.13. Benefits
 - 5.13.1. Medical, dental, and vision – employer and employee contribution rates for the most populated of each plan type; including metal tier designation.
 - 5.13.2. Other insurance provided such life and LTD.
 - 5.13.3. Defined Benefit Retirement Plans indicate general plan provisions and contribution rate (indicate if plan is fully funded; if not, then indicate the proportion of the contribution used for the unfunded liability).
 - 5.13.4. Defined Contribution Retirement Plan general provisions and employer and employee contributions.
 - 5.13.5. Other retirement or supplemental savings programs, such as a deferred compensation plan that has an employer match provision.
 - 5.13.6. Any other financial related retirement terms such as employer pick-up of employee contributions.
- 5.14. Paid Time Off

- 5.14.1. Vacation leave includes accrual rates and accrual limitations (maximum amount of leave they can accrue before losing it);
 - 5.14.2. Sick leave (accrual rate and buy-out options);
 - 5.14.3. Holidays includes paid holidays off and rate of pay when working a holiday (e.g. straight-time, time-and-a-half, etc.). Does jurisdiction also provide additional paid time off (e.g. additional day of leave); and
 - 5.14.4. Any other forms of paid excused time.
 - 5.15. Position information (per Benchmark)
 - 5.15.1. Participant job title;
 - 5.15.2. Participant position description compatibility level (matching to Benchmark description, not Benchmark title);
 - 5.15.3. Number of employees; and
 - 5.15.4. Average length of time in position.
 - 5.16. The Contractor shall provide a draft questionnaire to OFM for review and approval prior to release.
6. **Auditing of Database.** All data collected will be effective January 1, 2021. All data submitted by Participants and database entries must be checked and evaluated by the Contractor on an ongoing basis to include, but not be limited to, responses that are confusing, high/low, text in number field, numbers in text field, unrecognized symbols, acronyms, and left blank. Contact Participant for clarification, if applicable, and document who (name/position) and what date, provided that clarification. In addition to the above, OFM requires the Contractor to make clear associations between the Participant and the Benchmarks they respond to which includes the data provided for each. The Contractor shall provide a draft and final Audit of the following to OFM for approval by the dates contained herein.
- 6.1. Benchmarks
 - 6.1.1. Incorrect title/matching to the Benchmark description; and
 - 6.1.2. Low participation matches.
 - 6.2. Benefits – When information appears abnormally high/low compared to other Participant data.
 - 6.3. Salary Data – Verification of the salary provided by Participants against the salaries defined in the CBA/MOU, if applicable.
 - 6.4. Employee Count Data
 - 6.4.1. Check number of employees reported for each Participant's job class for reasonableness based on size of State; and
 - 6.4.2. Verification of Participant responses against the same data defined in the CBA/MOU.
 - 6.5. Integrating and Auditing the Participant responses via the WSCCS tool into the database for analysis.
7. **Internal Reports for Analysis.** OFM will require a set of general reports. There may be a request for additional specific reports to be provided for Interest Arbitration (See Section

11.0, Arbitration Experience/Specialization). Contactor shall develop, analyze, and provide OFM with error-free drafts and final reports including, but not limited to, those listed below:

- 7.1. Salary Comparisons;
- 7.2. Top Step Salaries (monthly values);
- 7.3. Longevity and interval amounts;
- 7.4. Pay Practices;
- 7.5. Benefits;
- 7.6. All elements of compensation rolled up into a total compensation comparison.
- 7.7. Additional presentation of data to reflect normalization of data to adjust salary information to account for geographic differences; and
- 7.8. Income tax rates for other state jurisdictions for potentially adjusting results for net salary after tax.

8. **Participant/External Report.** The Contractor shall create a complimentary Participant report with WSCCS results to be reviewed and approved by OFM prior to sending out to all Participants. This report shall include, but is not limited to the following, by the dates contained herein:

- 8.1. Executive Summary;
- 8.2. Background and Methodology; and
- 8.3. Results and Analysis.

9. **WSCCS Conclusion.** At the conclusion of the work in the Statement of Work, Contractor shall participate in a final meeting which participation includes, but is not limited to:

- 9.1. Providing all materials related to the WSCCS to OFM. This includes activity logs, all internal/external reports, all WSCCS related data, WSCCS database in Microsoft 2016 Excel or similar program, WSCCS questionnaire in Microsoft Word, etc.;
- 9.2. Knowledge transfer (provide training on WSCCS results and database functions);
- 9.3. Discussion of lessons learned, best practices, etc.; and
- 9.4. Answering questions related to WSCCS (data collection, reports, general info).

10. **Arbitration Experience/Specialization.** The Washington State Department of Corrections has interest arbitration with two unions, the Teamsters Local Union 117 and the Washington Federation of State Employees (WFSE). Should the State of Washington and either, or both, of these two unions go to interest arbitration, and either party in a hearing asks for testimony in regards to the WSCCS, the Contractor will be responsible for providing expert testimony on the WSCCS approach, methodology, auditing, and results. The Contractor will provide any and all needed data and/or reports in regard to arbitration issues. These may include, but are not limited to:

- 10.1. Securing/clarifying additional data points;
- 10.2. Additional charts, graphs, analysis of data; and
- 10.3. Any documentation and process related information.
- 10.4. When providing expert testimony or arbitration services, the CONTRACTOR will be paid only for time when actual professional services are provided. The CONTRACTOR will not be paid for travel time. These services, including travel and

other expenses, will be compensated under a separate expert witness contract with the Attorney General's Office.

11. OFM Roles and Responsibilities. The OFM's roles and responsibilities include, but shall not be limited to:

- 11.1. Provide WSCCS methodologies;
- 11.2. Provide Benchmark titles and descriptions;
- 11.3. Provide Participant List;
- 11.4. Provide access to the 2020 WSCCS Database;
- 11.5. Provide draft WSCCS Questionnaire;
- 11.6. Provide WSCCS data for State of Washington;
- 11.7. Provide copy of the 2020 Participant Report;
- 11.8. Meet regularly with the CONTRACTOR for status updates and Q&A's;
- 11.9. Review and approve WSCCS questionnaires, reports, and analysis prior to release;
- 11.10. Review and approve proposed project management plan/communication strategies; and
- 11.11. Review and approve proposed changes as outlined below.

Service Category 3: **Additional compensation consulting services, such as:**

1. Gathering and analysis of health care benefit plan values using Affordable Care Act metal tiers or other actuarial valuation
2. Gathering and analysis of employer contribution rates for defined benefit and defined contribution retirement plans
3. Adjustment of survey data using factors such as cost of living, cost of labor, regional price parity index and currency exchange rates
4. Additional surveys required by legislative mandate or to support State HR initiatives

Service Category 3 information is provided to inform Bidders of additional services that may be needed and added as Statements of Work during the Tier 2 process.

Exhibit B
RFQ 21-500
Overview of Washington State Class Plan and Compensation Structures

1. Description of classification plans

- 2.1. An overview of the State of Washington’s compensation and job classes can be found [here](#). Changes to class specifications and salary range assignment are based upon [statutory classification change criteria](#). Decision-making for salary range adjustments are informed by market pricing.
- 2.2. Salary structure amounts for represented positions may vary based on [collective bargaining agreement](#). Nonrepresented, represented and special salary ranges can be found [here](#).
- 2.3. There are two classification systems for classified represented and nonrepresented employee groups—Washington General Service and Information Technology Professional Structure. Job class specifications and salary range information can be found [here](#). The RFQ scopes of work for Service Category 1 and Service Category 2 will be used to conduct surveys for these classification systems. The scopes of work do not include evaluating, creating, or modifying existing job classifications.
 - Salary range assignments for [WGS](#) positions are determined using the whole job ranking method. Over the years, there have been multiple classification changes and salary range adjustments.
 - Salary range assignments for [ITPS](#) positions are determined using a job evaluation tool. This system was implemented on July 1, 2019. There have been no salary range adjustments to date.
- 2.4. There are three (3) civil-service-exempt represented classification systems—Washington State Patrol, Washington Ferries System, and Association of Washington Assistant Attorneys General. The RFQ scopes of work for Service Category 1 and Service Category 2 will not be used to conduct surveys for these classification systems.
- 2.5. There are three (3) [management](#) broadband classification systems. The RFQ scopes of work for Service Category 1 and Service Category 2 do not include work related to these classification systems.
 - Positions assigned to classified Washington Management Services must meet [inclusion criteria](#) as a Manager or Individual Contributor. Positions are evaluated using a job valuation assessment chart and assigned to a WMS broadband based on the resulting score. The employer determines incumbent pay within the band.
 - Positions assigned to civil-service-exempt Exempt Services pay structure must meet [inclusion criteria](#). Positions are evaluated using a job valuation assessment chart and assigned to an EMS broadband based on the resulting score.

- Civil-service-exempt agency official positions are assigned to the State Officials Salary Administration . Positions are evaluated using the Willis Point Value (proprietary) job evaluation tool and placed into banded “plateaus” based on the resulting score.

3. Description of current compensation structures

- 3.1. Classified Washington General Service classifications are assigned to a 13-step salary range. Non-represented employees move through their assigned salary range in accordance with WAC Chapter 357-28. Represented employees move through their assigned salary range in accordance with the related collective bargaining agreement. The RFQ scopes of work for Service Category 1 and Service Category 2 do not include modifying or creating new WGS salary structures.
- 3.2. WMS, EMS and SOSA have separate banded salary structures. The RFQ scopes of work for Service Category 1 and Service Category 2 do not include work related to these salary structures.
 - WMS has 5 bands. Movement through the band is limited to 25% for the duration of appointment to a specific position and based on growth and development.
 - EMS has 7 bands. Employee movement through the band is limited to 25% for the duration of appointment to a specific position and based on growth and development.
 - SOSA has 6 pay plateaus (pay bands where the maximum for each band is fixed).

Exhibit C
CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by OFM without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
5. I/we understand that the OFM will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of the OFM, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data, if any, which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other Proposer or to any competitor
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract with general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
9. I/we grant OFM the right to contact references and others, who may have pertinent information regarding the ability of the Bidder and the lead staff person to perform the services contemplated in this procurement.
10. If any staff member(s) who will perform work on this contract has retired from the State of Washington under the provisions of the 2008 Early Retirement Factors legislation, his/her name(s) is noted on a separately attached page.

We **(circle one)** **are/are not** submitting proposed Contract exceptions (See Section 2.10, Contract with General Terms and Conditions). If Contract exceptions are being submitted, I/we have attached them to this form.

On behalf of the Bidder submitting this proposal, my name below attests to the accuracy of the above statements.

Signature of Bidder

Title

Date

Exhibit F

The Office of Financial Management Style, Design and Graphics Guidelines for Contractors

Contractors are required to submit materials that adhere to the Office of Financial Management’s style guides and to the following standards. Materials that deviate from the style guide will not be accepted.

We use these guidelines to assure quality and consistency among the many reports we distribute and post online on behalf of the Governor’s Office and the Office of Financial Management.

OFM uses Microsoft and Adobe computer products. All final documents must be submitted in those formats. All source files become the property of OFM and will be provided to OFM staff upon request. Documents that do not meet style, design or graphic guidelines will be returned to the contractor for correction.

ADA-compliant format

Information posted on public websites is required to meet federal Americans with Disabilities Act standards (see <http://www.ada.gov> for more information) and must be submitted to OFM in an accessible (ADA-complaint) format. Image files (.jpg, .tiff, .png) are not accessible; neither are text or graphic files that are created by scanning.

Design guidelines

OFM uses the **Associated Press Stylebook** as its reference guide. Additional instructions are as follows:

- Use standard Microsoft fonts. OFM’s preferred fonts are:
 - » Garamond font, 12-point size, for body of text.
 - » Arial narrow font, 10-point size, for tables and charts.
 - » Arial narrow font, 16- and 14-point size bold, for headings, titles and subtitles.
- Text is single spaced, with double spacing between paragraphs.
- Margins should be standard .75 to 1 inch on all sides.
- Keep tables and graphs on one page — do not split among pages if they can be kept intact.
- The use of photos, drawings, illustrations and other images is strongly discouraged. They create file bloat and are not accessible (see section on **ADA-compliant format** for more information).

Graphic guidelines

Charts should be created in PowerPoint, Excel or Illustrator and imported into your Word document in an accessible format. Tables can either be created in Word or imported from Excel in an accessible format. Importing a screen shot is not acceptable as it is not accessible.

Logo

Your firm’s logo may appear on the front cover, title page and/or back cover pages *only*. Logos will not be allowed on the inside pages, or in headers and footers, because they unnecessarily increase file size. As your materials will be posted on OFM’s website, size is an important consideration for us.

Executive summary

In addition to the previous requirements, OFM strongly encourages that reports be submitted with a concise executive summary that explains the reason the report is being submitted (such as a budget proviso), a brief description of methodology (if pertinent), key findings and recommendations. While this list is not exhaustive, it is intended to convey the elements that a typical executive summary encompasses to provide a lay reader, or a very busy reader, with the report's gist.