

Request for Proposals No. 2026-12

School Apportionment Modernization

STATE OF WASHINGTON
OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION
OLYMPIA, WASHINGTON

PRE-BID CONFERENCE: 1:00 p.m., Pacific Time (PT) on December 9, 2025 | [Zoom](#)

PROPOSAL DUE DATE: 3:00 p.m., Pacific Time (PT) on February 13, 2026

ESTIMATED CONTRACT PERIOD: July 1, 2026, through June 30, 2028. Amendments extending the period of performance, if any, shall be at the sole discretion of OSPI.

CONSULTANT ELIGIBILITY: This solicitation is open to those Consultants who satisfy the minimum qualifications stated herein and that are available for work in Washington State.

SUBMIT PROPOSAL TO: contracts@k12.wa.us

All communications concerning this RFP must be directed only to the RFP Coordinator via email. Any other communication will be considered unofficial and non-binding on OSPI. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.

This RFP is available at the [Office of Superintendent of Public Instruction \(OSPI\) website](#) and at the Department of Enterprise Services, [Washington Electronic Business Solution \(WEBS\) Procurement website](#). All RFP amendments and/or Consultant questions and OSPI answers will be posted to these sites. All interested Consultants must be registered with WEBS under the following commodity codes to receive automatic notifications: All codes under 208; All codes under 209; 958-23; 961-56; 918-29; 920-03; 920-04; 920-05; 920-40; 920-46; 920-64

OSPI, and its Consultants and subcontractors, must not discriminate in any programs or services based on sex, race, creed, religion, color, national origin, age, marital status, honorably discharged veteran or military status, sexual orientation, gender expression, gender identity, disability, or the use of a trained dog guide or service animal by a person with a disability, and must comply with state and federal nondiscrimination laws, including Section 504 of the Rehabilitation Act of 1973, Title IX of the Education Amendments of 1972, the Americans with Disabilities Act, and Title VI of the Civil Rights Act of 1964. Questions and complaints of alleged discrimination should be directed to the Equity and Civil Rights Director at 360-725-6162/TTY: 360-664-3631; or P.O. Box 47200, Olympia, WA 98504-7200; or equity@k12.wa.us.



Washington Office of Superintendent of
PUBLIC INSTRUCTION

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SECTION A: SCOPE and REQUIREMENTS

This section describes the purpose of the RFP and provides information about this procurement, including the potential scope of the opportunity and requirements.

A.1 DEFINITIONS

Definitions for the purposes of this RFP include:

Agency or OSPI – The Washington State Office of Superintendent of Public Instruction; the entity issuing this RFP.

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

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

Apportionment – The process in which funding allocated by the state legislature is calculated and distributed to fund Public Schools in Washington. Apportionment is also the final system within the SAFS suite of systems used to calculate funding.

Bid – An offer, proposal, or quote for goods or services submitted in response to this RFP.

Bidder – Individual organization, public or private agency submitting a proposal to attain a contract with OSPI. For purposes of this Solicitation, the terms Bidder, Consultant, and Vendor are interchangeable.

Competitive Solicitation – A documented formal process providing an equal and open opportunity to Bidders or Consultants culminating in a selection based on predetermined criteria.

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

Consultant – Individual organization, public or private agency submitting a proposal to attain a contract with OSPI. For purposes of this Solicitation, the terms Bidder, Consultant, and Vendor are interchangeable.

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

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

Fiscal Year – In Washington State, a 12-month period extending from July 1 of one calendar year to June 30 of the next calendar year.

Proposal – A formal offer submitted in response to this RFP.

Proprietary Information – Information such as patents, technological information or other related information that the Bidder or Consultant does not want released or shared with the public.

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

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

RCW – [The Revised Code of Washington](#). A compilation of all permanent laws now in force in Washington state.

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

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

RFP Coordinator – An individual or designee who is employed by OSPI and who is responsible for conducting this Solicitation.

SAFS – School Apportionment Financial System: The collection of systems and processes used to calculate funding for each public school district. SAFS is the system for which a replacement (to be called **SASQUATCH**) is being sought via this RFP.

SASQUATCH – The system to be developed by the successful bidder to replace SAFS.

Solicitation – A formal process providing an equal and open opportunity for Bidders culminating in a selection based upon predetermined criteria.

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

Vendor – Individual organization, public or private agency submitting a proposal to attain a contract with OSPI. For purposes of this Solicitation, the terms Bidder, Consultant, and Vendor are interchangeable.

WAC – [Washington Administrative Code](#). A compilation of regulations affecting executive branch agencies that are issued by authority of statutes (i.e., legislative action or the state constitution).

WEBS – Washington’s Electronic Business Solution, the Consultant notification system found at [Washington Electronic Business Solution \(WEBS\) Procurement website](#) and maintained by the Washington State Department of Enterprise Services. Consultants are encouraged to register with WEBS to receive automatic notifications about this and other procurements.

A.2 PURPOSE OF REQUEST FOR PROPOSALS

The purpose of this Competitive Procurement is to receive competitive bids to evaluate and, as appropriate, award a Contract for the Office of Superintendent of Public Instruction (OSPI) to procure goods and/or services as set forth herein. Pursuant to Washington’s Procurement Code for Goods and Services, RCW chap. 39.26, state agency purchases of goods and services must be based on a competitive solicitation.

Therefore, OSPI is initiating this Request for Proposals (RFP) to solicit proposals from Consultants interested in participating in a project to modernize and transform the School Apportionment Financial Systems (SAFS) into the School Apportionment System for Quality, Accountability, Transparency, and Calculations Hub (SASQUATCH).

A.3. BACKGROUND

The Office of Superintendent of Public Instruction (OSPI) is the primary agency charged with overseeing K–12 public education in Washington state. The agency is led by State School Superintendent Chris Reykdal, who serves in a directly elected position. OSPI works with and distributes funds to the State’s two hundred and ninety-five (295) public school districts, to administer basic education programs and implement education reform on behalf of more than one million public school students. State law related to the allocation and calculation of funds for public education can be found in [RCW Title 28A: Title 28A RCW: COMMON SCHOOL PROVISIONS \(wa.gov\)](#). The most significant elements of the funding formula can be found in RCW 28A.150.260, the annual omnibus appropriations acts, and WAC Title 392 Chapters 392-121 through 392-140. OSPI is housed in the Old Capitol Building in Olympia.

OSPI’s School Apportionment Division uses the School Apportionment and Financial Systems (SAFS) system as its primary tool to allocate operating revenue across the state’s public K-12 education system. It was developed in house, using C#. SAFS includes 11 data input "forms" used by school districts, and interacts with 18 internal systems to collect and manage data concerning partners’ budgets, expenditures, student enrollment and school district staffing. Using an extensive

collection of sequenced formulae, this data is used to calculate and distribute payments of over \$27,307,000,000 per year in state and federal education funding to 380 educational entities.

The SAFS system acts as a critical data repository and reporting mechanism, providing critical information for school district budget development, enrollment and personnel reporting, legislative reporting, policy development, and school district financial statements used for local, state and federal accountability and financial reporting purposes. Data must be accessible and, in some cases, updateable for several years to support projections and auditing. As such, the new system must be capable of financial reporting in accordance with state established financial reporting requirements and Generally Accepted Accounting Principles (GAAP).

Due to annual legislative updates policies and reporting mandates for education funding, SAFS calculations and reporting have become more complex than the legacy system was designed to handle when it was implemented, more than 20 years ago. Given the increasing complexity and unwieldy nature of the customized legacy system, the legislature requested that OSPI complete a feasibility study to explore and define the future state of apportionment and conduct an Alternatives Analysis to determine the best fit solution strategy for the SAFS Modernization. This feasibility study has been completed. Additional information related to the feasibility study can be found under Resources and Materials on the [School Apportionment webpage](#).

The feasibility study completed in 2024 confirmed that there is a clear and immediate need to modernize the aging SAFS legacy system with future-state capabilities addressing deficits in its front-end data collection, data repository, business rule and/or calculation engines, validation and auditing, and reporting. OSPI seeks to transform the legacy SAFS system using secure, modern technologies to establish an efficient, user-friendly, secure platform for education data collection, funding and enrollment calculation, payment distribution and data, budgeting, and financial reporting. Guided by principles of maintaining focus on customers and increasing operational efficiency and leveraging modern technology, the SAFS Modernization will address improvement opportunities including greater agility, integrated architecture, data integration, automation, self-service and accurate forecasting.

A.4. VISION, GOALS, AND OBJECTIVES

OSPI seeks a technical solution that will transform the legacy SAFS system using secure, modern technologies to establish a uniform, streamlined and user-friendly platform for data collection and analysis, funding and enrollment calculation, payment distribution, and reporting of approximately fifty percent (50%) of Washington's overall statewide General Fund expenditures per biennium. This new solution must be adaptable to changing input, output, and calculation requirements without additional coding, and must align with federal and state financial accountability standards. It is also expected that the new solution will minimize any changes to the current processes of external users, including data input methods and formats, whenever reasonably possible.

All new solutions must demonstrate measurable alignment with the following Washington State Enterprise IT Strategic Plan goals as well as OSPI's Vision and Priorities:

WaTech Strategic Plan

GOAL 1: Create a government experience that leaves no community behind.

GOAL 2: Better data, better decisions, better government, better Washington.

GOAL 3: Innovative technology solutions create a better Washington.

GOAL 4: Transform how we work. Best Workforce Ever.

OSPI Superintendent's Priority #4: A Committed, Unified, and Customer-Focused OSPI.

SASQUATCH Key Objectives

OSPI identifies the following key features for high-level future state improvements for the School Apportionment Systems Replacement:

Agility: Improve responsiveness to frequent, complex Legislative updates.

Integrated Architecture: Leverage modern tools to proactively integrate data collection, calculation and output capabilities.

Projections: Reduce manual effort and enable financial projections for relevant periods such as the 4-year forecast and the final two months of the school year that cross into a separate fiscal year.

Data Integration: Automatically connect SAFS to a variety of related data sources throughout the OSPI enterprise.

Ease of Use: Maintain current import and data collection methods when reasonably practicable to minimize impact on external system users.

Automation: Modernize processes for creating and managing workflows, data, oversight, publishing, and projections.

Self-service Upgrades: Increase accessibility and transparency for OSPI Technical and Business staff to update information and upgrade the system, reducing reliance on external contractors and developers.

Reporting: Support and enhance legacy end-user reports and implement a custom reporting facility.

Figure 1: SAFS Business Capacity Model (BCM) Outlines Future State Requirements

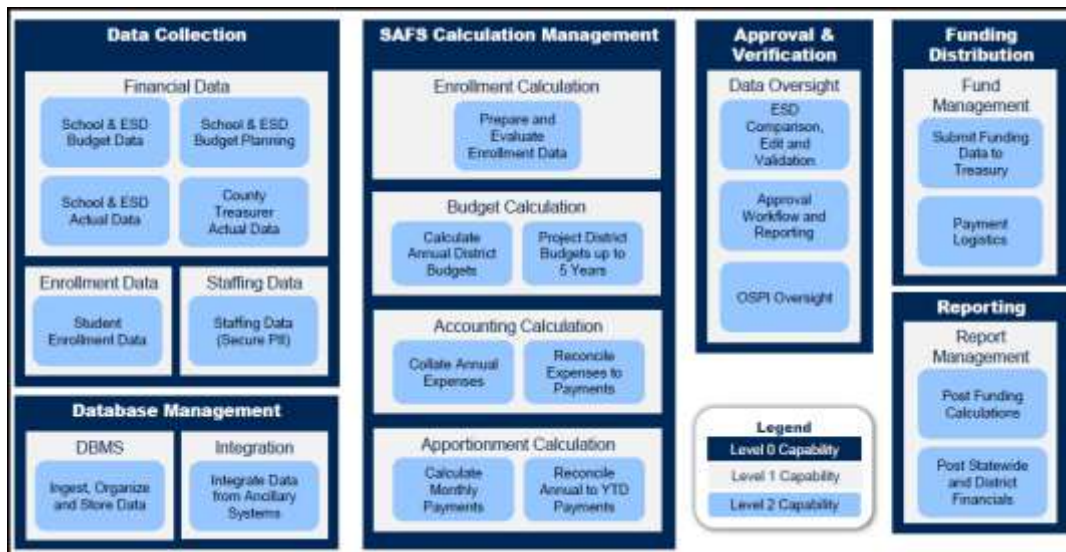
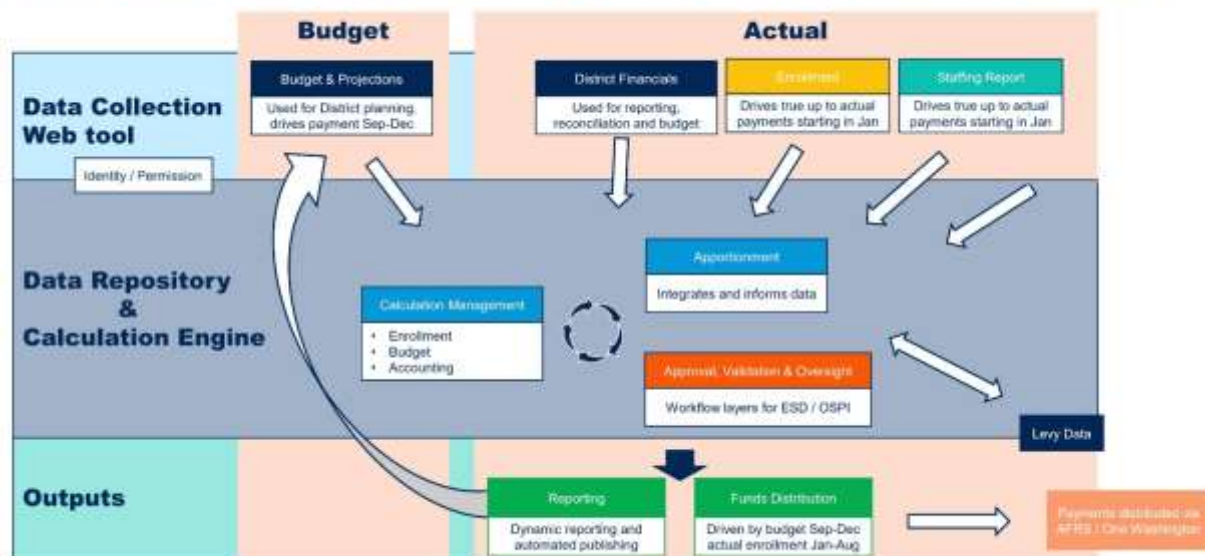


Figure 2: SAFS Future State Workflow

The Future State SAFS Workflow shows how the functions interact



Estimated Project Period

We anticipate being able to begin work on this project on or soon after July 1, 2026. Development work through implementation and training and other hand-over work is expected to be completed by June 30, 2028. Additionally, the Contractor may be asked at OSPI's discretion to provide ongoing support and potentially further development up to June 30, 2031.

Place of Work Performance

The Contractor may perform much or all of the work at their own facility (i.e., offsite). OSPI uses Microsoft Teams to informally communicate and for most meetings when one or more team members are offsite. If desired, Contractor can perform work at OSPI's 600 Washington ST NE, Olympia site when the building is open for use. However, Consultants are only required to be on-site to pick up and drop off equipment or attend mandatory meetings which require their presence to provide meaning or understanding, or to complete work that cannot be done remotely. They may be requested to attend in-person status meetings on occasion.

The Contractor will be granted access to OSPI's servers and necessary IT services. They will also be given temporary accounts, including an OSPI O365 account, which are to be used only for work pertaining to the work defined in this contract. Upon completion of the contract, these accounts will be closed.

When on-site work is required, the Contractor will submit security forms to OSPI for clearance and access badges to the facility. The Contractor will be issued building access identification specifically identifying them as a Contractor. Access identification must always be worn when in the OSPI facility.

For projects that include particularly sensitive data, Contractor may have to complete a Washington State Patrol/FBI background check, which is initiated by providing fingerprints at a site approved by the State Patrol, before being able to work.

A.5. SCOPE OF WORK

Work Sections

The SAFS Replacement System and its project will be known as SASQUATCH. The body of work can be divided into three work sections: Data Collection and Review; Data Calculations and Estimations; and Data Reporting.



These work sections must include the following high-level functionality. Note: cells in the same row are not related to one-another; instead, read by column only.

Data Collection and Review	Data Calculations and Estimations	Data Reporting
Provide a calendar visible to internal and external users showing when various data must be collected	Provide a platform that stores data and permits users to view calculation formulae displayed with plain English field names and operators. Note: OSPI prefers that School Apportionment is housed in OSPI's Azure cloud	Generate district-specific reports that display data corresponding to one or more data sets (e.g., Financial Status, Enrollment, Staffing, etc.)
Provide select internal users the ability to modify (CRUD) data validations when needed; provide an audit trail of changes	Permit select internal users to modify calculation formulae displayed with plain English field names and operators and apply start and end dates to the changes. For that data submitted prior to the change, use the calculations in effect at the time that they were submitted. If start date is in future, use existing calculation until that date	Generate ESD- and County-oriented reports that display data corresponding to one or more data sets (e.g., Financial Status, Enrollment, Staffing, etc.) for each of the districts that the entity contains
Provide select internal users the ability to manually override data collection periods for individual or all districts	Provide a hierarchical approval process and audit trail for changes made by internal users to calculations	Generate reports for legislature to address their particular interests and needs
Alert district-based users when a data collection period opens	Provide a sandbox environment in which select users can create one or more new calculations and compare them to existing calculations, and to other new calculations. Comparisons can use current or historical data.	Generate and support posting reports to OSPI's public-facing website reports, including filters so that users can drill down to the districts/regions and data that is of interest to them

Data Collection and Review	Data Calculations and Estimations	Data Reporting
	Comparisons must provide side-by-side view of the outcome of many calculations. (Typical use case: legislature wants to compare the outcomes for different proposed changes [including "statewide constraints"] to funding formulae)	
Create interfaces for districts to transmit data to OSPI electronically (e.g., API, .csv) or (at district's option) via a GUI; provide also paper forms for select data sets	Permit select users to copy a formula from the sandbox to the production environment	Implement a platform for creating custom reports
Save incoming data report; depending on data type, 'overwrite' or 'add' a data collection to prior data of the same kind	Calculations can be run against data as a complete group, or as many times as required to include all districts so as to ensure timely payment regardless of when late reporters submit their data	Regenerate reports as new data is added to them, or existing data is edited or removed
Provide validations to district users against the data they have submitted, regardless of how it was collected	Provide a projection sandbox for school district users to estimate state funding for future years using state supplied legislative factors or individually determined factors, allowing for side by side comparisons between estimates and comparison with prior year actual funding.	Alert select internal users when a new version of a report is updated
Alert select internal users when a report is submitted		

Data Collection and Review	Data Calculations and Estimations	Data Reporting
Provide select internal users an interface to review and approve/reject district data, highlighting all data that fail validations		
Permit select internal staff to release a group's data so that districts—aside from those who have failed to submit on time—can be paid. Permit also late reports to be released at a later date		

The requirements that add detail to the table above and comprise the project's scope are included in **Attachment A**.

Consultants (including, if desired, their subcontractors) are invited to bid on work to implement one, two, or all three work sections of work, to match their area of expertise and staffing or platform limitations. **OSPI reserves the right to award contracts for fewer work section than the Consultant has bid on.** As such, Consultants must include in their proposal a section describing additional costs and staffing necessary to collaborate with other contractors employed to complete the remaining work sections. These amounts will not be included in the final contract price if the contractor is awarded the work on all three work sections.

Apportionment staff members with extensive expertise in the business will be available part-time (in other words, they need to be able to continue their regular work) to answer questions, clarify requirements, and perform end-user testing.

To accomplish the general objective of the RFP, under the resulting contract, the selected Consultant shall perform the following specific duties to the satisfaction of the OSPI Contract Manager:

1. Collaborate with OSPI staff to complete business and data analysis.
2. Collaborate with OSPI staff to design, build, and implement a school apportionment system to replace the current legacy system, which accommodates various means by which school districts report data and OSPI staff review these inputs; the extensive and dynamic catalog of business rules and formulas needed to properly calculate and

distribute school apportionment funds, and the many canned reports and custom reporting capabilities.

3. Identify and operationalize process improvements to better synchronize agency workflows that interact with the apportionment systems, including new ways to share data to reduce instances of multiple collections of similar or identical data.
4. Create a dashboard that permits authorized users to make annual adjustments to business rules, formulas, schedules, and metadata (such as school names), and a 'sandbox' to test such changes. This sandbox must further permit OSPI and Washington State Legislature to model and compare different funding or enrollment scenarios.
5. Integrate modern security practices that conform to agency and Washington Technology Solutions (WaTech) guidance in terms of securing the platform, its data, and role-based access.
6. With staff, develop a transition and training plan to support users of the replacement system, including agency staff, Educational Service Districts (ESDs), school districts, tribal compacts, and other external partners. Materials may include, at the discretion of OSPI, training videos, user manuals, and slide decks.
7. Provide training and materials for internal system administrators and IT support. Materials may include, at the discretion of OSPI, training videos, user manuals, and slide decks.
8. Provide, emulate, or (with the explicit consent of the business) update all forms and reports generated by the system, or used by system users to report data to OSPI. Ensure all data collected in the SAFS systems can be extracted and generated into standardized and custom reports.

Project Governance

While OSPI's preferred approach to this project is to engage a single vendor capable of delivering all three work sections of this project (i.e., Data Collection, Data Calculations, and Data Reporting), we acknowledge that awards may be distributed across multiple vendors. In such cases, the following governance structure will be implemented to ensure cohesive project execution:

1. **OSPI Steering Committee:** The OSPI Steering Committee will serve as the overarching governance body for the project. It will be responsible for reviewing and approving project change requests, managing risks, and resolving issues that may arise throughout the project lifecycle.
2. **Vendor Coordination and Communication:** All awarded Contractors will be required to participate in regularly scheduled status meetings, convened at the discretion of

OSPI. These meetings will facilitate transparent and timely communication across all parties and ensure alignment to project goals and progress. OSPI retains final authority over decisions related to schedules, timelines, priorities, and any coordination of integration efforts between work sections.

3. **Work Section Integration:** The Data Calculations work section will serve as the foundational component of the project. The Data Collection and Data Reporting sections will be expected to configure their respective solutions to integrate seamlessly with the Data Calculations solution, based on its defined requirements.
4. **Shared Project Artifacts and Documentation:** OSPI will maintain a centralized repository for project documentation, requirements, and decisions. All Contractors will have access to relevant materials to ensure alignment and reduce miscommunication.
5. **Issue Resolution Process:** A formal issue resolution process will be in place to address disputes or misalignments between vendors. Issues will be escalated to the OSPI Steering Committee for review and resolution, with decisions made in the best interest of the overall project.
6. **Defined Requirements:** While the project is comprehensive, the requirements have been identified by work section. Overlapping responsibilities will be minimized when appropriate, and any shared dependencies will be managed through OSPI oversight.
7. **Integration Protocols and Technical Standards:** OSPI will communicate integration protocols, data exchange standards, and technical requirements to ensure compatibility across work sections. Contractors will be expected to adhere to these standards to facilitate seamless interoperability.

OCM Change Management

The Contractor shall provide comprehensive Organizational Change Management (OCM) services throughout the entirety of the Software Development Life Cycle (SDLC) for the school apportionment system project. These services are essential to ensure the successful adoption of the new system by all stakeholders—including OSPI staff, Washington State legislators, district users, student’s parents, and other affected entities—and to minimize resistance during the transition to new processes and technologies.

The Contractor’s OCM approach shall include strategies and activities to assess readiness, identify and mitigate resistance, and foster user engagement and adoption. OCM activities must include, but are not limited to, stakeholder analysis and engagement, communication planning and execution, training needs assessment and delivery, user support strategies, and management of feedback loops to monitor adoption and inform continuous improvement.

The Contractor shall collaborate with OSPI, district leadership, school staff, and other affected parties to develop and implement strategies that address organizational impacts, clarify roles and responsibilities, and support users throughout each phase of the SDLC.

The Contractor shall coordinate OCM activities with the project's overall schedule, ensuring that change management milestones align with design, development, testing, and deployment phases. OCM deliverables shall include documented plans, communication materials, training artifacts, and post-implementation adoption assessments.

The proposal shall describe the Consultant's methodology, tools, and prior experience in providing OCM within complex public-sector technology implementations. The response should identify key personnel responsible for OCM, their qualifications, and how OCM will be integrated with project management and technical workstreams.

Consultant Governance and Reporting

The Consultant shall describe in its proposal how they will establish and maintain a comprehensive governance and reporting framework to ensure effective oversight, accountability, and transparency throughout all phases of the Software Development Life Cycle (SDLC). The Consultant's governance approach shall clearly define roles, responsibilities, decision-making authorities, and communication protocols to support coordination with the Agency's project management and executive oversight structures.

The Consultant shall assume that they will be required to collaborate closely with and accept guidance from the Project Team.

The Contractor shall provide regular, structured reports to the Agency that document project status, progress against approved schedules and deliverables, budget utilization, identified risks and issues, mitigation and corrective actions, change requests, and performance metrics. Reports shall be submitted in a format and at a frequency approved by the Agency.

The Contractor shall participate in recurring governance meetings, including but not limited to steering committee sessions, project management reviews, and technical workgroup meetings, as directed by the Agency. The Contractor shall be responsible for preparing meeting materials, maintaining records of decisions, and tracking action items to resolution.

The Consultant shall describe in its proposal the tools, systems, and methods to be used for project tracking, documentation, and reporting. The proposed approach shall ensure the Agency has timely, accurate, and comprehensive visibility into project status and performance throughout the SDLC, in accordance with applicable state and Agency oversight and reporting requirements.

Data Handling and Migration Strategy

The Consultant shall provide a comprehensive Data Strategy that addresses all phases of data transition from existing legacy systems to the new School Apportionment System. This strategy

shall include a detailed plan for data assessment, mapping, cleansing, transformation, validation, and reconciliation to ensure accuracy, integrity, and continuity of operations. In collaboration with OSPI staff, the Contractor shall identify data sources, determine and apply rules for retaining and displaying data from prior years, establish data quality standards, and define procedures to manage discrepancies and data anomalies.

The plan must accommodate the expectation that the legacy system and its replacement will be parallel run for some time during the development process.

Throughout the Software Development Life Cycle (SDLC), the Contractor shall integrate data migration planning and activities with system design, testing, and deployment milestones. The Consultant shall develop and maintain a Data Migration Plan that outlines key tasks, responsible parties, timelines, and dependencies. The plan shall be updated as the project progresses to reflect findings from data profiling, pilot migrations, and stakeholder feedback.

The Contractor shall ensure that data migration activities are conducted securely, in compliance with applicable state and federal data protection regulations. Please note that the Apportionment System's data includes elements containing "Category 4: 'Confidential information requiring special handling'", as defined by WaTech at watech.gov/categorizing-data-state-agency.

The Contractor shall provide documentation and reports verifying data completeness, consistency, and auditability following each migration phase. Additionally, the Consultant shall work closely with the Agency to validate migrated data and resolve any identified issues prior to system go-live.

Finally, the Consultant must describe their method for cross-functional business process mapping and integrated requirements validation prior to final design approval, to ensure alignment and reduce the risk of reinforcing silos.

The Consultant's proposal shall describe their data migration methodology, tools, quality assurance measures, and experience performing similar migrations for complex, high-volume government or education data systems.

Training and Knowledge Transfer

The Consultant shall provide a comprehensive Training and Knowledge Transfer Plan that ensures that end users and agency staff are equipped to effectively utilize, maintain, and support the School Apportionment System throughout and after implementation. The Consultant's approach shall include the design and delivery of role-based training for school district personnel responsible for submitting and validating data and the OSPI staff who support and guide them, and who run calculations and prepare reports. Training shall be tailored to user groups' Key work section and technical proficiency, incorporating a mix of delivery methods such as instructor-led sessions, virtual workshops, interactive tutorials, and reference

documentation. OSPI will lead stakeholder engagement, but Contractor must provide materials, facilitation, and support as directed.

Knowledge transfer shall occur continuously throughout the Software Development Life Cycle (SDLC) to ensure agency business and IT staff develop sufficient understanding of the system's architecture, configuration, data structures, integration points, and maintenance procedures. The Consultant shall embed agency staff in key phases of the project—such as requirements validation, testing, and deployment—to promote hands-on learning and operational readiness.

At project conclusion, the Contractor shall deliver comprehensive system documentation and conduct formal knowledge transfer sessions to support OSPI's long-term self-sufficiency. These sessions shall include walkthroughs of system administration tools, troubleshooting procedures, and ongoing data management processes. The Contractor shall verify knowledge transfer effectiveness through collaborative exercises, checklists, or assessments prior to project closeout.

Business Continuity and Transition Implementation

The Consultant shall describe a comprehensive Business Continuity and Transition Implementation approach that ensures uninterrupted operations and data integrity throughout all phases of the Software Development Life Cycle (SDLC). The proposed strategy should identify processes and controls to maintain system functionality during planned and unplanned disruptions, including contingencies for infrastructure failures, cyber incidents, and other events that could impact service delivery or data accessibility.

The Consultant's response should outline methods for risk identification, impact analysis, and mitigation planning specific to system development, testing, deployment, and ongoing maintenance. This includes defining clear recovery objectives (RTO/RPO), backup and restoration procedures, and escalation protocols. The Consultant should describe how these measures will be validated through regular testing and updates to reflect evolving system configurations and operational requirements, as well as include one or more Business Continuity Plan crisis recovery scenarios to evaluate appropriate responses to a disruption.

In addition, the Consultant shall provide a Transition Implementation Plan to ensure the smooth and orderly handoff of all project components to State operations or subsequent vendors at project completion. This plan should address continuity of operations during the transition phase, including data migration, environment stabilization, documentation handover, and role delineation to prevent service interruption.

The Consultant's Business Continuity and Transition Implementation Plan must align with the State's security, compliance, and operational standards, and shall demonstrate the Consultant's ability to sustain reliable service delivery while ensuring a seamless transfer of operational responsibility at the conclusion of the engagement.

Work Requirements

As part of completing work for this project, the Contractor will use OSPI's development standards (to be provided upon contract award) and adhere to OSPI architectural guidance and policies.

OSPI employs the SCRUM development framework for Information Technology Projects. It plans to address the work described in this document in two-week sprints, with each sprint featuring Sprint Planning and Sprint Review meetings, along with occasional Sprint Retrospective and regular Stand-up meetings.

1. Prior to initiating work, OSPI and the Contractor will meet to review scope, schedule, cost, acceptance criteria, and payment timeframes as part of a formal deliverable composed of work units.
2. The Contractor and OSPI will document their agreement to authorize work on the agreed upon deliverables.
3. An OSPI Product Owner will manage the backlog and collaborate with the team to set priorities for each two-week sprint in Sprint Planning meetings.
4. The Contractor will be asked to provide revised "effort" estimates for work assigned as deliverables, including the estimated cost to complete each two-week sprint.
5. The Contractor will inform OSPI as soon as possible of any blockers to completing his or her work, including (but not limited to) any time he or she will be unavailable.
6. The Contractor must track his or her progress against deliverables within Dev Ops in timely manner.
7. The Contractor will present their code at regular intervals to OSPI IT, who will be responsible for conducting code reviews.
8. The Contractor must demonstrate to team members working software at the end of each two-week sprint.
9. The Contractor must participate in essential OSPI project team activities, especially as they relate to technical requirements, design, development, and implementation activities.
10. The Contractor must advise and support OSPI (or other OSPI-contracted) staff responsible for the technical functional and non-functional requirements of the system, systems design, and verification activities.

Acceptance Criteria

The SCRUM team, under the leadership of the Product Owner, will collaboratively view the Contractor's demonstration of working software at the close of each two-week sprint. Simultaneously, the IT Team will conduct code reviews of all updates. Together, they will ensure the scope of work, schedule, quality defect management, and quality attributes (e.g., that

functionality meets requirements; all OSPI standards are met; and that the design, data relationships, and coding is error free) before releasing payment for the deliverable.

Adherence to Policy and Standards

1. All Contractor's team members and/or subcontractors performing work for OSPI are responsible for being aware of and adhering to all data privacy, security, and information technology policies of WaTech and the Agency.
2. The Contractor is expected to hold all data as confidential and will not disclose this data to any other entity or person that is not authorized to receive the data.
3. The Contractor is expected to comply with all appropriate OSPI process standards (Requirements for Development and Management, Project Management Methodology, Configuration Management, Solutions Delivery Lifecycle, etc.)
4. The Contractor must comply with all Agency and State policies (ethics, Internet/email usage, security, harassment). In some cases, he or she may be required to complete mandatory training.

Accessibility and Branding Requirements

All documents, videos, audio records, presentations, or other deliverables required under the resulting Contract shall be produced in format, compliant with the Americans With Disabilities Act and follow the Web Content Accessibility Guidelines (WCAG) 2.0, OSPI's formatting standard specified in Exhibit G – OSPI Americans with Disabilities Act Compliance: Graphics and Colors, OSPI's Brand Use Policy, OSPI's Style Guide, and OSPI's Videography Style Guide which are hereby incorporated by this reference. For narrative or documentary style videos required under the resulting Contract, the final product and all raw footage shall be mailed to the OSPI Communication and Digital Media office on a hard drive furnished by the Consultant. In the event that the deliverables are not compliant, OSPI may require Consultant to promptly make modifications that will make the deliverables compliant. Additionally, OSPI shall have the right to modify or copy the deliverables in order to make them accessible and/or compliant.

Failure to Comply

Failure to comply on a continuing basis with the terms stated here and/or in the resulting contract shall result in contract termination. OSPI shall supply a copy of all such policies to the awarded Consultant.

A.6. CONTRACT AWARDS

Work Section

Pursuant to this Competitive Solicitation, OSPI intends to evaluate bids and award Contracts by specified work section:

Work Section 1 – Data Collection and Review

Work Section 2 – Data Calculation and Estimations

Work Section 3 – Data Reporting

Collaboration and Work Management

Proposals will be evaluated by work section. Bidders may submit proposals for one, two, or all three specified work sections for which they are eligible for a Contract Award. To support comprehensive proposals across all work sections, bidders are encouraged to engage subcontractors or other qualified resources for any components that fall outside their primary area of expertise. This approach enables bidders to present complete solutions by leveraging specialized capabilities through partnerships.

In cases where a bidder is awarded a contract for only one or two work sections, they must identify how they will collaborate and coordinate with other awarded bidders to ensure seamless integration and delivery across all sections of the work.

Consultants (including, if desired, their subcontractors) are invited to bid on work to implement one, two, or all three work sections of work, to match their area of expertise and staffing or platform limitations. **OSPI reserves the right to award contracts for fewer work sections than the contractor has bid on.** As such, contractors must include in their proposal a section describing additional costs and staffing necessary to collaborate with other contractors employed to complete the remaining work section. These amounts will not be included in the final contract price if the contractor is awarded the work on all three work sections.

A.7. BIDDER QUALIFICATIONS

Minimum Qualifications

- Consultant must be licensed to do business in the State of Washington. If not licensed, provide a written intent to become licensed in Washington within thirty (30) calendar days of being selected as the Apparent Successful Bidder.
- Consultant must demonstrate experience developing at least one (1) sizeable financial system using the architectural approach described in the bidder's response.

Consultants who do not meet these minimum qualifications will be rejected as non-responsive and will not receive further consideration. Any proposal that is rejected as non-responsive will not be evaluated or scored.

Desirable Qualifications

Consultants with experience, knowledge, or demonstrated abilities in developing school district data collection systems, school district budget and accounting reporting or in school district funding distribution systems are desired.

A.8. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about July 1, 2026, and end on or about June 30, 2028. The option to extend any contract resulting from this procurement shall be at the sole discretion of OSPI.

OSPI reserves the right to amend to extend the contract for three (3) additional contract years through June 30, 2031. The decision to amend shall be based on sustained satisfactory performance as decided by the Contract Manager, successful completion of project objectives, and availability of funding. If OSPI provides a renewal notice to the Consultant, the Consultant shall be obligated to enter into a contract with the same fiscal obligations as the previous Contract year, provided that OSPI and Consultant shall negotiate any revision of additional services or goals beyond those encompassed in the previous Contract.

Additional services that are appropriate to the scope of this RFP, as determined by OSPI, may be added to the resulting contract by a written amendment mutually agreed to and executed by both parties.

A.9. FUNDING

The exact financial terms shall be determined during contract negotiation. Proposals shall include Consultant's most favorable and competitive cost estimate to perform the work; however, OSPI does not represent or guarantee any minimum purchase from the resulting contract.

For reference, OSPI has established a financial estimate of \$9,000,000.00 for the total cost of project implementation including three (3) years of post-implementation maintenance and operations support, inclusive of all applicable sales tax. Bidders are advised to consider this budgetary target to ensure alignment with budgetary constraints and fiscal responsibilities.

The Consultant shall not be entitled to reimbursement of any applicable travel expenses incurred during the scope of the contract, including but not limited to, mileage, meals, lodging, or other travel-related expenses.

Any contract awarded is contingent upon the availability of funding. Bidders are encouraged to provide their most favorable and competitive cost estimate to perform the work.

A.10. AMERICANS WITH DISABILITIES ACT

OSPI complies with the Americans with Disabilities Act (ADA). Consultants may contact the RFP Coordinator to receive this Request for Proposals in an alternative format.

SECTION B: GENERAL INFORMATION FOR BIDDERS

This section describes the procurement timeline and includes useful information for Bidders such as procurement procedure and state requirements.

B.1. RFP COORDINATOR

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

Contact Information	
Name:	Kyla Moore
Address:	600 Washington Street South PO Box 47200 Olympia, WA 98504-7200
Email Address:	contracts@k12.wa.us

B.2. QUESTIONS AND ANSWERS

Any questions or communications concerning this RFP must be directed only to the RFP Coordinator noted in Section B.1. Questions and/or inquiries must be sent via email and should include the RFP number. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator will be considered unofficial and non-binding on OSPI, and may result in disqualification of the Consultant. Answers or other applicable addenda will be posted to OSPI and WEBS in accordance with the schedule in Section B.3.

Bidders are encouraged to make any inquiry regarding the Competitive Solicitation as early in the process as possible to allow OSPI to consider and, if warranted, respond to the inquiry. If a Bidder does not notify the Procurement Coordinator of an issue, exception, addition, or omission, such matter may be considered to be waived by the bidder for protest purposes.

B.3. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Action	Date
OSPI issues RFP	November 10, 2025
Question and Answer period	November 10, 2025 - January 9, 2026
OSPI hosts Pre-Bid Conference	1:00 p.m. PT on December 9, 2025
OSPI posts Question and Answer Addendum or Amendment resulting from Pre-Bid Conference (if necessary)	December 16, 2025
Letter of Intent due	5:00 p.m. PT on December 17, 2025
Last date to submit questions regarding RFP	January 9, 2026
OSPI posts final Question and Answer Addendum or Amendment (if necessary)	January 23, 2026
Complaints due	February 6, 2026
Proposals due	3:00 p.m. PT on February 13, 2026
OSPI conducts evaluation of written proposals	February 16 – March 6, 2026
OSPI conducts demonstration interviews with finalists (if determined necessary by OSPI)	March 16-27, 2026
OSPI announces “Apparent Successful Bidder” and sends notification to unsuccessful Bidder(s)	April 7, 2026
OSPI conducts debriefing conferences (if requested)	As requested, per debriefing instructions
Contract negotiation begins	April 7, 2026
Anticipated contract start date	July 1, 2026

OSPI reserves the right to revise the above schedule.

B.4. LETTER OF INTENT

It is recommended that Consultants intending to submit a proposal provide a ***Letter of Intent to propose no later than 5:00 p.m. PT on December 17, 2025.*** The letter must be submitted via email to the RFP Coordinator.

B.5. PRE-BID CONFERENCE

A pre-bid conference is scheduled to be held on December 9, 2025, at 1:00 p.m. PT. The purpose of the pre-bid conference is to clarify the Competitive Solicitation as needed and raise any issues or concerns that bidders may have.

The pre-bid conference will be held virtually: <https://zoom.us/j/94382947860>

All prospective Consultants should attend; however, attendance is not mandatory. Written questions may be submitted in advance to the RFP Coordinator. OSPI shall be bound only to written answers to questions. Any oral responses given at the pre-bid conference shall be considered unofficial until OSPI releases a written copy of the questions and answers from the pre-bid conference. A copy of the questions and answers in the form of an Addendum will be published on the OSPI website and released on WEBS under the commodity code(s) listed on the cover page of this RFP within five (5) business days of the pre-bid conference.

Assistance for disabled, blind, or hearing-impaired persons who wish to attend the pre-bid conference is available with prior arrangement by contacting the Procurement Coordinator.

OSPI has the right to cancel or stop the pre-bid conference if no interested bidders join within thirty (30) minutes of the start.

B.6. COMPLAINT PROCEDURE

The complaint process is available to Consultants interested in this RFP. The complaint process allows Consultants to focus on the Solicitation requirements and evaluation process and raise issues with these processes early enough in the process to allow OSPI to correct a problem before proposals are submitted and time expended on evaluations.

A Consultant may submit a complaint based on any of the following:

- The Solicitation unnecessarily restricts competition;
- The Solicitation evaluation or scoring process is unfair or flawed; or
- The Solicitation requirements are inadequate or insufficient to prepare a proposal.

Consultants may submit complaints up to five (5) business days prior to the proposal due date noted in the Estimated Schedule of Procurement Activities. However, Consultants are encouraged to submit complaints as soon as possible so OSPI can rectify the issue(s) early in the process. Complaints must be submitted to the RFP Coordinator. To be considered a valid complaint, the complaint must meet the following requirements:

- Must be in writing.
- Should clearly articulate the basis for the complaint.
- Should include a proposed remedy.

Complaints not received by the deadline noted in the Estimated Schedule of Procurement Activities will not be reviewed by OSPI. Failure by the Bidder to raise a complaint at this stage may waive its right for later consideration.

The OSPI Contracts Administrator or an employee delegated by the Contracts Administrator will review valid complaints and respond to the submitter in writing. OSPI will consider all complaints but is not required to adopt a complaint, in part or in full. OSPI's response to the complaint is final and not subject to administrative appeal. The response, and any changes to the RFP, will be posted as an amendment to WEBS prior to the proposal due date. Any complaint addressed during the complaint process cannot be raised during the protest process.

B.7. PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Your entire response to this RFP is a public record and will be disclosed consistent with the Public Records Act, Chapter 42.56 RCW. Bid submissions and evaluations are temporarily exempt from public disclosure until announcement of the ASB(s).

CONFIDENTIAL DOCUMENTS

For the purposes of this RFP, do not include confidential or proprietary information unless specifically requested by OSPI.

If OSPI requests confidential or proprietary information, you must clearly print the word "Confidential" on the lower right-hand corner of each page containing the confidential or proprietary information.

PUBLIC RECORDS REQUESTS

If a public records request seeks your proposal and the proposal contains pages clearly marked "Confidential", OSPI will take the following steps:

- We will notify you. We will identify the requestor and the date that OSPI will disclose the requested records.
- We will give you an opportunity to seek a court order to stop OSPI from disclosing the records.
- We will not evaluate or defend your claim of confidentiality. We will not withhold or redact your documents without a court order.

If you have any questions, refer to the [OSPI Public Records Office](#).

B.8. ADDENDUMS AND AMENDMENTS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, an addendum or an amendment will be published on the [OSPI website](#). For this purpose, the published Consultant questions and Agency answers, and any other pertinent information, shall be considered an addendum to the RFP. Additionally, all addenda referred to above will be released on WEBS under the commodity

code(s) listed on the cover page of this RFP. Only Consultants who have properly registered in WEBS will receive automatic notification of amendments or other correspondence pertaining to this RFP. For those not registered in [WEBS](#), it will be the responsibility of interested Consultants to check the website periodically for addenda and amendments to the RFP.

B.9. SMALL BUSINESS, MINORITY AND WOMEN'S BUSINESS ENTERPRISES (MWBE), AND VETERAN-OWNED BUSINESS PARTICIPATION

In accordance with the legislative findings and policies set forth in [RCW 39.19](#), 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 RFP or on a subcontractor basis. For more information on certification, contact the [Washington Office of Minority and Women's Business Enterprises](#). However, no preference points will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis.

[RCW 43.60A.200](#) encourages the participation of Veteran and Service Member Owned Businesses certified by the Washington State Department of Veterans Affairs [RCW 43.60A.195](#). For more information on certification, contact [Washington State Department of Veteran Affairs](#).

Additionally, per Department of Enterprise policy, agencies are encouraged to buy from in-state small business, including microbusinesses and minibusinesses.

Vendors who meet criteria set forth in chapter [39.19 RCW](#), should indicate status on the *Consultant Intake Form*.

B.10. ETHICS, POLICIES, AND LAW

This RFP, the evaluation of proposals, and any resulting contract shall be made in conformance with applicable Washington State laws and Policies.

Specific restrictions apply to contracting with current or former state employees pursuant to RCW 42.52. Bidders should familiarize themselves with the requirements prior to submitting a proposal. Bidders shall indicate on their *Consultant Intake Form* any current or former state employees who are employed by, or subcontracted with, Bidder.

B.11. ACCEPTANCE PERIOD

Proposals must provide ninety (90) business days for acceptance by OSPI from the due date for receipt of proposals. OSPI may accept such bid, with or without further negotiation, at any time within such period.

B.12. RESPONSIVENESS

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative and minimum requirements and instructions specified in this RFP- i.e., does the bid include each of the required bid submittals, are the submittals complete, signed, legible. OSPI may reject a Proposal as non-responsive at any time for any of the following reasons:

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

The RFP Coordinator or evaluator(s) may contact any Bidder for clarification of the proposal. A bidder's failure to provide requested information to OSPI within ten (10) business days may result in disqualification. If a proposal is deemed non-responsive, it shall be removed from further consideration. Bidders whose proposals are found to be non-responsive shall be disqualified from further evaluation and shall be notified in writing.

If a proposal meets all administrative and Bidder qualification requirements and submittal instructions, OSPI shall continue with the written evaluation and, if applicable, the oral evaluation.

OSPI reserves the right at its sole discretion to waive informalities. An informality is an immaterial variation from the exact requirements of the Competitive Solicitation, having no effect or merely a minor or negligible effect on quality, quantity, or delivery of the goods or the quality, capability, or performance of the services being procured, and the correction or waiver of which would not affect the relative standing of, or be otherwise prejudicial, to bidders.

B.13. MOST FAVORABLE TERMS

OSPI 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. OSPI does reserve the right to contact a Bidder for clarification of its proposal.

The Bidder should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. 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 OSPI.

B.14. CONTRACT AND GENERAL TERMS AND CONDITIONS

The Apparent Successful Bidder will be expected to enter into a contract which is substantially the same as the sample contract and its General Terms and Conditions. In no event is a Bidder to submit its own standard contract terms and conditions in response to this RFP. The Bidder may submit exceptions documented in the Contract Issues Exhibit. OSPI will review requested exceptions and accept or reject the same at its sole discretion.

Should contract negotiations fail to be completed within two (2) weeks after initiation, the Agency may immediately cease contract negotiations, declare the Bidder with the second highest score as the new Apparent Successful Bidder, and enter into contract negotiations with that Vendor. This process will continue until the Contracts are signed or no qualified Bidders remain.

B.15. COSTS TO PROPOSE

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

B.16. NO OBLIGATION TO CONTRACT

This RFP does not obligate the State of Washington or OSPI to contract for services specified herein. OSPI also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract without penalty.

B.17. REJECTION OF PROPOSALS

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

B.18. COMMITMENT OF FUNDS

Only an authorized representative of OSPI may legally commit OSPI to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

B.19. STATEWIDE VENDOR PAYMENT REGISTRATION

Consultants awarded contracts as a result of this RFP will be required to register as a Statewide Vendor (SWV). The SWV file is a central vendor file maintained by the Office of Financial Management for use by Washington State agencies in processing vendor payments. This allows vendors to receive payments from all participating state agencies by direct deposit, the State's preferred method of payment. All OSPI Consultants are required to register as a Statewide Vendor; however, participation in direct deposit is optional. For online registration, visit the [Office of Financial Management website](#).

B.20. WASHINGTON STATE BUSINESS REGISTRATION

Consultants awarded contracts as a result of this RFP will be required to register with the Washington Secretary of State and/or Washington State Department of Revenue if registration requirements set forth by the [Department of Revenue](#) apply.

B.21. INSURANCE COVERAGE

The Apparent Successful Bidder must comply with the insurance requirements identified in the General Terms and Conditions.

The Consultant shall, at its 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 Consultant shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to OSPI within fifteen (15) days of the contract effective date.

SECTION C: PROPOSAL CONTENTS

This section identifies how to prepare and submit a bid/proposal for this Competitive Solicitation. In addition, bidders will need to review and follow the Competitive Solicitation requirements including those set forth in the exhibits, which identifies the information that bidders must provide to the Procurement Coordinator to constitute a responsive bid. By responding to this Competitive Solicitation and submitting a bid, bidders acknowledge having read and understood the entire Competitive Solicitation and accept all information contained within this Competitive Solicitation.

C.1. SUBMISSION OF PROPOSALS

Consultants shall submit proposals as an attachment to an email to the RFP Coordinator noted in Section B.1. **Proposals must arrive by 3:00 p.m. PT on February 13, 2025.** The RFP number must be noted in the email subject line. Attachments to the email shall be Microsoft Word, Portable Document Format (PDF), or a zipped file. The maximum file size that can be received via email at OSPI is 35MB. Bidders should also be aware of their own service provider's limits which may be more restrictive. Proposals that exceed such limits may be submitted via OneDrive. OSPI does not assume responsibility for any problems with the electronic delivery of materials, unless it is determined that OSPI's email system or server was at fault.

Proposals not received by the deadline will not be reviewed. Late proposals will not be accepted and will be automatically disqualified from further consideration. Proposals must respond to the procurement requirements. Do not respond by referring to material presented elsewhere. The proposal must be complete and must stand on its own merits.

Failure to respond to any portion of the procurement document may result in rejection of the proposal as non-responsive. All proposals and any accompanying documentation become the property of OSPI and will not be returned.

C.2. PROPOSAL OVERVIEW

Proposals must be formatted to print on eight and one-half by eleven (8 ½ x 11) inch paper size with individual sections clearly identified. The Letter of Submittal, excluding the signed *Certifications and Assurances* and *Consultant Intake Form*, shall be a maximum of one page.

Only one proposal will be accepted from each Consultant. As a reminder, OSPI reserves the right to award contracts for fewer work sections than the Consultant has bid on. As such, Consultants must include in their proposal a section describing additional costs and staffing necessary to collaborate with other contractors employed to complete the remaining work section(s).

The five major sections of the proposal are to be submitted in the order noted below: All required sections of this proposal are to be submitted in the order noted below:

1. Letter of Submittal including signed certifications, as applicable
 - A. Certifications and Assurances
 - B. Contract Issues List (if applicable)
 - C. Qualification Affirmations
 - D. Contract Intake Form
2. Management Proposal – one per Proposal
3. Technical Approach – one per Proposal
4. Proposed Business Solution – to be separated for each work section included in Consultant's Proposal, and aligned with each individual Financial Proposal:
 - A. Work Section 1 – Data Collection and Review
 - B. Work Section 2 – Data Calculation and Estimations
 - C. Work Section 3 – Data Reporting
5. Financial Proposal – to be separated for each work section included in Consultant's Proposal:
 - A. Work Section 1 – Data Collection and Review
 - B. Work Section 2 – Data Calculation and Estimations
 - C. Work Section 3 – Data Reporting

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Consultant in preparing a thorough response.

C.3. LETTER OF SUBMITTAL

The Letter of Submittal shall include introductory remarks, contact information for the Bidder's point of contact for the proposal, and applicable certifications must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, (e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship). The Qualification Affirmations documents must summarize and affirm how the Consultant meets the requirements of the project.

File Expectations

- Separate email attachment(s) labeled in accordance with the file naming convention specified below.
- Required Format: PDF
- File naming convention:
 - BidderName_1_SUBMITTAL.pdf

C.4. MANAGEMENT PROPOSAL

The Management Proposal shall include the following sections to provide a comprehensive summary of the Bidder's ability to fulfil the requirements of the proposal. Proposals that do not meet the minimum qualifications for this section will not move forward in the evaluation process.

Experience of the Consultant/Staff

1. **Relevant Experience** – Describe how the Consultant meets the minimum qualifications and, if applicable, the desired qualifications. Include other relevant experience that indicates the qualifications of the Consultant, and any subcontractors, for the performance of the potential contract.
2. Bidder shall also affirm minimum qualifications on the **Qualification Affirmations Form**.
3. **Related Contracts** – Include a list of contracts the Consultant has had during the last five years that relate to the Consultant's ability to perform the services needed under this RFP. Include a summary of how each project demonstrates skills and competencies relevant to this RFP. List contract reference numbers, contract period of performance, contact persons, phone numbers, and email addresses.
4. **Examples/Samples of Related Projects/Previous Work** – Provide two examples or samples of previous work/deliverables for related projects. Include a summary of how each project demonstrates experience or alignment to SAFS functionality.

Subcontractors

Identify any known or potential subcontractors who will be assigned to the potential contract.

Once a contract is awarded, the contract will be subject to compliance tracking using the State's business diversity management system, Access Equity (B2Gnow). Confidential information (Tax ID, etc.) will not be published. Consultants that have previously registered with B2Gnow for any public entity, must verify the system has updated information. User guides and documentation related to Consultant and Subcontractor access to and use of

Access Equity are provided by the Office of Minority and Women's Business Enterprises in the Access Equity Help Center.

Each month during the contract, the Consultant is required to report payments to all Subcontractors through the Access Equity system. This monthly reporting information includes total payment in dollars made to the Subcontractor, payment dates, and any additional information required to verify payment to Subcontractors. The Consultant shall enter this payment information into the Access Equity system, and require the Subcontractors verify the information in the system. Online training is available through the Access Equity/B2Gnow system. This requirement applies to both Consultants and Subcontractors, proposed during the procurement process and/or after a contract has been awarded and/or executed.

Project Management/Team Structure/Internal Governance Controls

Bidders must include a high-level project governance plan as part of their proposal. The plan should describe how the project will be managed and overseen to ensure successful delivery. Key elements to address include:

1. Roles and responsibilities of the project team
2. Proposed assigned team members
 - A. Provide each team member's qualifications
 - B. Indicate when, and the amount of time, each team member will be assigned to the project.
3. Org Chart/Decision-making structure and escalation paths
4. Communication and reporting protocols
5. Risk and issue management approach
6. Change control process
7. Stakeholder engagement and coordination
8. Consultant's governing approach for collaborating with multiple vendors to maintain accountability, transparency, and alignment with project objectives.

Organizational Change Management

Consultants must include a high-level Organizational Change Management (OCM) plan as part of their proposal. The plan should describe the proposed approach for preparing, supporting, and enabling stakeholders through the transition to the new solution. Key elements to address include:

1. Stakeholder engagement and communication strategies
2. Change impact assessment and mitigation

3. Training and knowledge transfer plans
4. Adoption and readiness activities
5. Feedback and continuous improvement mechanisms

The plan should reflect the bidder's experience and methodology for managing organizational change, tailored to the scale and complexity of the proposed solution, without prescribing specific tools or frameworks.

References, Past Performance

List names, addresses, telephone numbers, and fax numbers/email addresses of three business references for whom the Bidder has completed work has been accomplished and briefly describe the type of service provided for them. If your proposal includes hosting on a separate service or platform, you must also provide an additional two references for the hosted service.

By submitting a proposal in response to this RFP, the Consultant and team members grant permission to OSPI to contact these references and others who, from OSPI's perspective, may have pertinent information. OSPI may or may not, at OSPI's discretion, contact these references or others. OSPI reserves the right to use references to confirm satisfactory customer service, performance, satisfaction with service/product, knowledge of products/service/industry and timeliness. Any negative or unsatisfactory reference can be reason for rejecting a bidder as non-responsible.

File Expectations

- Separate email attachment(s) labeled in accordance with the file naming convention specified below.
- Required Format: PDF
- File naming convention:
 - BidderName_2_MANAGEMENT_PROPOSAL.pdf
 - BidderName_2_REFERENCES.pdf

C.5. TECHNICAL APPROACH

The Technical Approach Proposal shall include the following sections to provide a comprehensive description of the Bidder's technical approach for all included Work Sections. Proposals that do not address all areas of this section will not move forward in the evaluation process.

Project Approach/Methodology

Include a complete description of the Bidder's proposed project approach and methodology. This section should include the following elements:

1. Bidder's Understanding of the Project

- A. Summary of the bidder's understanding of the project objectives, scope, and desired outcomes.
- B. Recognition of any unique challenges or considerations (e.g., stakeholder needs, data sensitivity, integration requirements).

2. Methodology and Strategy

- A. Description of the overall approach or methodology (e.g., Agile, Waterfall, hybrid).
- B. Explanation of how the approach aligns with best practices and the specific needs of the project.

3. Collaboration and Communication

- A. Plan for engaging with stakeholders, including communication protocols and feedback loops.
- B. If applicable, how the bidder will coordinate with subcontractors or other awarded vendors.

4. Quality Assurance

- A. Approach to ensuring quality, accuracy, and compliance throughout the project.
- B. Testing strategies and validation processes.

Innovation and Value-Add

- A. Any unique tools, techniques, or insights the bidder brings to enhance project outcomes.
- B. Opportunities for efficiency, scalability, or long-term sustainability.

Risk Management

Include the Bidder's approach to risk management and contingency planning. Describe categories or types of risks you identify as being significant to the success of any project. Include examples of how you would propose to effectively monitor and manage these risks, including reporting of risks to the Agency's contract manager. Examples may include:

- A proposal for minimizing staff turnover and its impact on the Agency's contract management staff.
- A business continuation plan that illustrates how you will monitor and manage through:
 - Times of labor disruption
 - Labor low performance issues
 - Loss of facility and/or key staff/personnel

WaTech Compliance

Proposed solutions must meet minimum WaTech Security Standards. At a minimum, the proposal must address:

- 1. Security Design Review** - Consultant must complete a preliminary Security Design Review for WaTech as part of the proposal submission process. Security Design Reviews will be evaluated for compliance with WaTech Security Standards.
- 2. WaTech Security Policies** - Consultant must include a detailed description of the cybersecurity measures incorporated into their proposed solution.
 - A. [Washington State Cybersecurity Program Policy](#)
 - B. [Security Assessment and Authorization Policy](#)
 - C. [It Security and Privacy Awareness Training Policy](#)
 - D. [Asset Management Policy](#)
 - E. [Change Management Policy](#)
 - F. [Access Control Policy](#)
 - G. [Data Sharing Policy](#)
 - H. [IT Security Incident Response Policy](#)
 - I. [Information Security Risk Management Policy](#)
 - J. [Information Technology Disaster Recover Planning Policy](#)

Data Handling Strategy

Include a complete description of the Consultant's proposed data migration strategy. This section should convey the Consultant's understanding of the complexities involved and address key considerations such as:

- I. Data assessment and preparation
- II. Migration methodology and sequencing
- III. Identity management and access controls
- IV. Data integrity and validation
- V. Risk mitigation and rollback planning
- VI. Post-migration support and monitoring

The strategy should reflect best practices and be tailored to the proposed solution. While a full technical implementation plan is not required at this stage, bidders must provide enough detail to convey their overall approach and rationale.

Outcomes and Performance Measurement (KPI)

Describe the Key Performance Indicators (KPI) the Bidder proposes to monitor the implementation of the proposed solution to achieve the objectives of this project.

Include how these KPIs would be monitored, measured, and reported to the state agency.

Note: Mere repetition of the work statement in Section 1 will not be considered responsive.

File Expectations

- Separate email attachments labeled in accordance with the file naming convention specified below.
- Required Format: PDF and Excel
- File naming convention:
 - BidderName_3_TECHNICAL_APPROACH.pdf
 - BidderName_3_SECURITY_DESIGN_REVIEW.xlsx

C.6. PROPOSED BUSINESS SOLUTION (PROJECT PLAN)

A separate Project Plan must be provided for each Work Section included in the proposal. Each Project Plan shall include the following sections to provide a comprehensive description of the Bidder's proposed project plan for this RFP to program staff and subject matter experts.

Work Plan (Proposed Solution)

Include a detailed description of the Bidders proposed work plan. Include all project requirements and the proposed tasks, services, activities, etc., necessary to accomplish the scope of the project defined in this RFP. Call out all tasks, services, and activities which include another contractor if awarded only one or two work sections of the system. This section of the User Proposal must contain sufficient detail to convey to technical and non-technical members of the evaluation team the Bidder's knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement or assumed commitments of OSPI staff. The Bidder may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.

Requirements Review

As a mandatory part of your response, follow the instructions within Attachment A – Sasquatch Systems Requirements and return, as part of your response, a copy of that document

identifying your proposed solution's capability to meet each requirement (Out-of-the-Box, Configuration, Small Customization, Large Customization, Third-Party Product, or Other). For all requirements where the solution requires Small Customization, Large Customization, Third-Party Product, or Other, include an explanation of how the solution will be made to meet the requirements.

Project Schedule

Include a proposed project schedule indicating when the elements of the work will be completed and when deliverables, if any, will be provided. Identify any in-kind assumptions for OSPI staff to be included in each milestone, including estimated FTE commitment.

Performance Based Contracting Deliverables Schedule

RCW 39.26.180 requires that, to the extent practicable, Washington State agencies enter into performance-based contracts. Performance-based contracts identify expected deliverables and performance measures or outcomes and are contingent on the Consultant providing such deliverables or achieving performance outcomes.

This project complies with Section 701 of the 69th Legislature 2025 Regular Session Senate Bill 5197: Gated Funding. Deliverables and Payment Schedule must reflect the required 15% holdback. Holdback payments will be released upon satisfactory completion and approval of all deliverables within each funding gate.

Provide a performance-based contracting deliverables schedule that fully describes the deliverables to be submitted under the proposed contract, along with each deliverables corresponding payment. Deliverables are the services and materials Bidders provide as described in contract agreements.

Business Continuity Plan

Include a high-level business continuity strategy describing how the proposed solution and implementation approach will successfully migrate operations to the new system(s), ensuring continuity of operations in the event of disruptions. Key elements to address include:

1. Identification of critical business workflows and dependencies
2. Risk assessment and mitigation strategies
3. Backup and recovery plans for systems and data
4. Contingency planning for service interruptions or delays
5. Communication protocols during incidents

Alignment with organizational continuity and disaster recovery policies

The strategy should reflect the bidder's approach to maintaining operational resilience and minimizing downtime, without prescribing specific technologies or tools.

Training and Knowledge Transfer

Bidders must include a high-level training and knowledge transfer plan as part of their proposal. The plan should describe how stakeholders will be prepared to effectively use and support the new system. Key elements to address include:

1. Training strategy for end users, technical staff, and administrators
2. Formats and delivery methods (e.g., in-person, virtual, self-paced)
3. Timing and sequencing of training activities
4. Knowledge transfer approach to internal teams for ongoing support
5. Documentation and reference materials to be provided
6. Support for post-implementation learning and adoption

The plan should reflect the bidder's approach to enabling stakeholder success and long-term sustainability of the solution, without prescribing specific tools or platforms.

Project Risks

Define specific risks you identify as being significant to the success of this project. Include an example of how you would propose to effectively monitor and manage these risks, including reporting of risks to the Agency's contract manager. Provide examples of your response to this section in your preferred Risk Register or tracking matrix.

File Expectation:

- Separate email attachments labeled in accordance with the file naming convention specified below.
- Required Format: PDF and Excel
- File naming convention:
 - BidderName_4_[section name]_PROJECT_PLAN.pdf
 - BidderName_4_REQUIREMENTS_REVIEW.xlsx
 - BidderName_4_[section name]_RISK.xlsx (pdf acceptable)

C.7. FINANCIAL PROPOSAL

The evaluation process is designed to award this procurement not necessarily to the Bidder of least cost, but rather to the Bidder whose proposal best meets the requirements of this RFP.

However, Bidders are encouraged to consider the project's estimated budget and submit proposals that are consistent with state government efforts to conserve state resources.

If the Bidder is awarded a Contract, the total price for the goods and/or services shall be the Bidder's price as submitted on Attachment D – Cost Proposal Breakdown Workbook. Except as provided in the Contract, there shall be no additional costs of any kind.

The Bidder shall submit one Cost Proposal inclusive of all Work Sections included in the bid. However, each Work Section must have its own Cost Proposal Breakdown Workbook.

Identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the Contract. The Bidder is to submit a fully detailed budget including staff costs, administrative costs, and any other expenses necessary to accomplish the tasks and to produce the deliverables under the Contract using the Cost Proposal Breakdown workbook. A separate Cost Proposal Breakdown workbook must be completed for each Work Section included in the Bidder's bid. Additionally, the Bidder will identify three years of maintenance and operations costs required to maintain the proposed solution after development is complete. A Bidder's failure to identify all costs in a manner consistent with the instructions in this Competitive Solicitation is sufficient grounds for disqualification. Bidders are required to collect and pay Washington State sales tax, if applicable.

Section 701 Compliance

This project complies with Section 701 of the 69th Legislature 2025 Regular Session Senate Bill 5197: Gated Funding. All payments are subject to a required 15% holdback. Holdback payments will be released upon satisfactory completion and approval of all deliverables within each funding Gate.

Cost Proposal Verification

Costs represented on the Cost Proposal Breakdowns must match total costs provided in the Performance Based Contracting Deliverables Schedule in Section C.7.iii. Discrepancies or inconsistencies between cost documents will result in the proposal being considered non-responsive.

Identification of Costs – One per proposal

Bidders must provide a detailed narrative summary of the proposed cost structure, clearly outlining how resources will be allocated to support the successful delivery of contract objectives. The cost proposal should identify and explain all development costs, including but not limited to software, development, hosting, licensing, and training. Additionally, the cost proposal must include three years of post-development maintenance and operations costs. Each category should include a breakdown of proposed costs and a description of how these costs contribute to the overall execution of the project. **Include all applicable sales taxes in the total cost of the proposal.**

Bidders must include in their proposal a section describing additional costs and staffing necessary to collaborate with other contractors employed to complete the remaining work section. These amounts will not be included in the final contract price if the contractor is awarded the work on all three work sections.

Additionally, Bidders must justify any high-cost items or significant investments by explaining their necessity, strategic value, and alignment with project goals. Justifications should demonstrate how these expenditures support long-term efficiency, scalability, or performance improvements. The proposal should reflect thoughtful planning, cost-effectiveness, and responsible resource management.

Cost Proposal Breakdown – One per Work Section

Cost Proposal Breakdown workbook contains three sheets:

1. **Cost Proposal Breakdown** – Identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the Contract. Include costs necessary to address requirements that you've specified as needing Small and Large Customizations, or that require the intervention of a third party.
2. **Cost Proposal Assumptions** – Provide a breakdown of any assumptions of in-kind costs or supports that your proposal expects OSPI's to fulfill during and after the project.
 - All development costs identified and detailed as outlined in this sheet
 - 3 years of Maintenance and Operations cost after the completion of Development
3. **Sub-Contractor Cost Summary** – Provide if applicable
 - All development costs identified and detailed as outlined in this sheet
 - 3 years of Maintenance and Operations cost after the completion of Development

Travel Costs

The Consultant shall not be entitled to reimbursement of any applicable travel expenses incurred during the scope of the contract, including but not limited to, mileage, meals, lodging, or other travel-related expenses.

Subcontractor Costs

Costs for subcontractor are to be broken out separately for review and reporting. Please provide any subcontractor costs included in the cost proposal in this section, and note if any subcontractor is certified by the Office of Minority and Women's Business Enterprises.

Indirect Costs

Per OSPI's indirect costs policy, the maximum amount that may be charged or included in contracts is the following:

Entity	State Contracts	Federal Contracts
School Districts	State recovery rate	Federal indirect rates, per OSPI's agreement with the U.S. Department of Education
Educational Service Districts	Per annual letter of agreement by K-12 Financial Resources Division	Per annual letter of agreement by K-12 Financial Resources Division
All other entities (including higher education, non-profits, independent Contractors, etc.)	10%	10%

File Expectations

- Separate email attachment(s) labeled in accordance with the file naming convention specified below.
- Required Format: PDF and Excel
- File naming convention:
 - BidderName_5_FINANCIAL_PROPOSAL.pdf
 - BidderName_5_DATA_COLLECTION_COST_BREAKDOWN.xlsx
 - BidderName_5_DATA_CALCULATION_COST_BREAKDOWN.xlsx
 - BidderName_5_DATA_REPORTING_COST_BREAKDOWN.xlsx

C.8. TECHNICAL INTEGRATION PLAN

OSPI's preferred approach to this project is to award a single bidder capable of delivering all three work sections of this project to streamline coordination, reduce project risk, and ensure consistent implementation of data security protocols. However, recognizing that multiple awards may occur, bidders are requested to include a detailed plan outlining how technical integration across all work sections will be achieved, specifically if required to work with multiple bidders. This plan should address strategies for minimizing inter-vendor dependencies, reducing overall project costs, and safeguarding data integrity and security throughout the solution lifecycle. Bidders should address the following objectives in their integration plan to support project success:

Technical Compatibility and Centralized Architecture – Ensure seamless integration across all three work sections—Data Collection, Data Calculations, and Data Reporting—using a centralized data architecture that supports secure, scalable, and efficient data exchange.

Minimize Inter-Vendor Dependencies – Design solutions and workflows that reduce reliance on coordination between separate vendors, lowering the risk of delays, misalignment, and integration challenges.

Cost Efficiency – Propose integration strategies that streamline implementation, avoid duplication of effort, and optimize resource utilization to reduce overall project costs.

Data Integrity, Security, and Compliance – Adhere to OSPI’s data protection standards and applicable privacy regulations. Integration plans must include secure APIs, encryption, access controls, audit logging, and mechanisms for error handling and data validation.

Governance, Testing, and Support – Align with OSPI’s change management processes for cross-section impacts. Participate in joint testing and quality assurance activities and provide ongoing support and maintenance for integrated components throughout the project lifecycle.

File Expectations

- Separate email attachments labeled in accordance with the file naming convention specified below.
- Required Format: PDF and Excel
- File naming convention:
 - BidderName_6_TECHNICAL_INTEGRATION.pdf

SECTION D: EVALUATION AND AWARD

D.1. EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this RFP and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by OSPI, which will determine the ranking of the proposals.

Evaluation Gates

OSPI will use the following process and evaluation criteria to determine eligibility for a Contract award.

Consultants may only submit one proposal. However, proposals that include more than one Work Section will be evaluated as separate proposals. Each section of the proposal will be evaluated following a review of the content required in Section C. Proposal Contents. Proposals will be evaluated by section and work section in the following order:

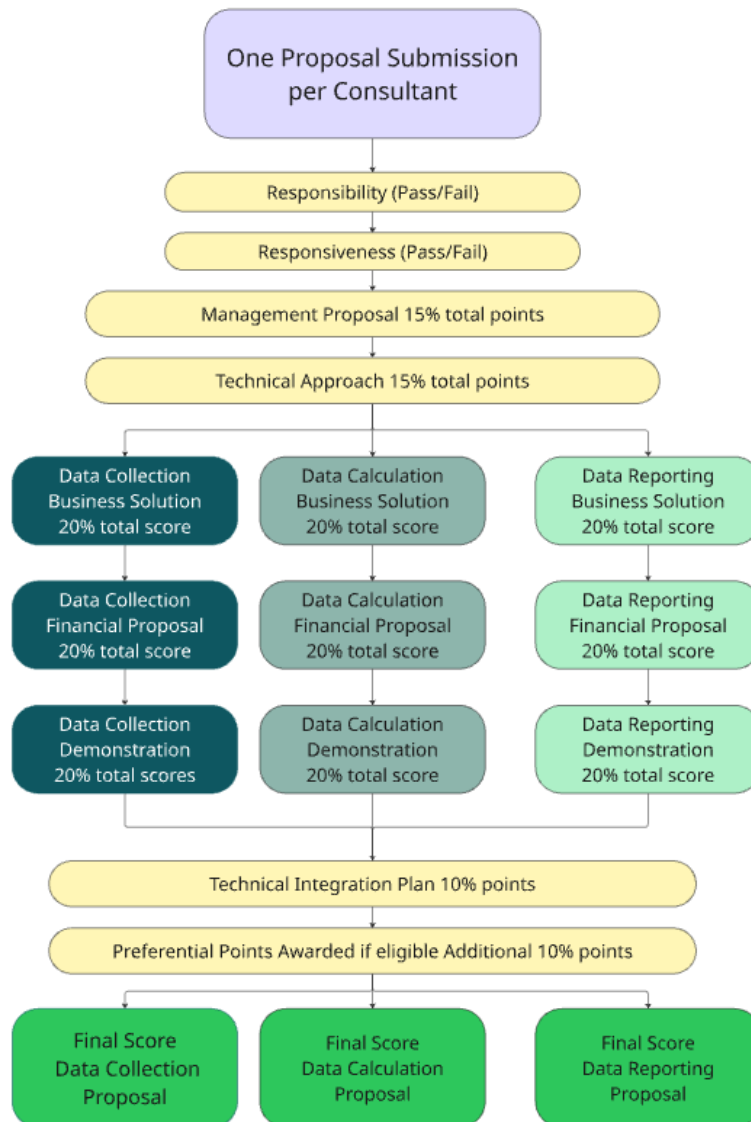
Proposal Section	Percentage of total points available:
1. Responsiveness	Pass/Fail
2. Responsibility	Pass/Fail
3. Management Proposal	15%
4. Technical Approach	15%
5. Business Solution/Project Work Plan	20%
6. Financial Proposal	20%
7. Demonstrations	20%
8. Technical Integration Plan	20%
9. Preference Points	Up to additional 10%

Scoring Notes

- **Responsiveness and Responsibility** are Pass/Fail evaluation gates
- OSPI reserves the right to reject a proposal as non-responsive if it does not earn a minimum of 60% of the available points in any evaluation gate.
- **Management Proposal, Technical Proposal, and Technical Integration Plan Sections** are scored once and applied to all proposal options submitted by the consultant. Management Proposal and Technical Proposal are each worth 15% of the

total evaluation points. Technical Integration Plan is worth 10% of the total evaluation points.

- **Business Solution, Financial Proposal, and Demonstrations** are scored independently by Work Section. Business Solution and Financial Proposal sections are each worth 20% of the total evaluation points. Work Section Demonstration is worth 30% of the total evaluation points. Consultants' proposal may include any combination of 1, 2, or 3 Work Sections.
- Each Work Section included in the proposal will be evaluated separately, and will constitute a **separate proposal score**.



OSPI reserves the right to award contracts for fewer work sections than the Consultant has bid on.

Proposals that meet the minimum criteria for each section will be scored and points totaled will be used to determine final rankings of responsive proposals.

Responsiveness – Pass/Fail; points not awarded

Refer to Section B.12 for the criteria used to determine if a proposal is initially considered Responsive. Proposals that are deemed non-responsive will not be considered.

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this RFP and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by OSPI, which will determine the ranking of the proposals.

Responsibility – Pass/Fail; points not awarded

For responsive bids, OSPI will determine whether the bidder is a “responsible bidder.” Accordingly, OSPI may make reasonable inquiry to determine bidder responsibility on a pass/fail basis. In determining bidder responsibility, OSPI may consider the following statutory elements:

- Bidder’s ability, capacity, and skill to perform the contract or provide the service required;
- Bidder’s character, integrity, reputation, judgment, experience, and efficiency;
- Bidder’s ability to perform the contract within the time specified;
- Bidder’s performance quality pertaining to previous contracts or services;
- Bidder’s compliance with laws relating to the contract or services;
- Whether, within the three-year period immediately preceding the date of the Competitive Solicitation, bidder has been determined by a final and binding citation and notice of assessment issued by the Washington State Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in RCW 49.48.082, any provision of chapter 49.46, 49.48, or 49.52 RCW; and
- Such other information as may be secured having a bearing on the decision to award the Contract.

In accordance with RCW 39.26.160(2)(a)-(g), OSPI may request financial statements, credit ratings, references, record of past performance, clarification of bidder’s bid, on-site inspection of bidder’s or subcontractor’s facilities, or other information as necessary to determine bidder’s capacity to perform and the enforceability of bidder’s contractual commitments. Failure to respond to these requests may result in a bid being rejected as non-responsive.

Management Proposal – Pass/Fail; points awarded

Bidder's Management Proposal will be evaluated to determine the suitability of the Bidder to provide the goods and/or services required in the RFP. Proposals that do not include all elements requested in Section C.4 Management Proposal will be considered non-responsive and will not pass this gate.

Proposals must score at least 60% of the available points to advance through this evaluation stage. Proposals that meet the minimum criteria for this section will be scored and points included in the total to determine final rankings of responsive proposals.

Technical Approach – Pass/Fail; points awarded

Bidder's Technical Proposal will be evaluated to determine the suitability of the proposal. Proposals that do not include all elements requested in Section C.5 Technical Approach will be considered non-responsive and will not pass this gate.

Proposals must score at least 60% of the available points to advance through this evaluation stage. Proposals that meet the minimum criteria for this section will be scored and points included in the total to determine final rankings of responsive proposals.

Proposed Business Solution/Project Plan - Pass/Fail; points awarded

Bidder's Project Plan will be evaluated to determine the suitability of the proposal to meet the business requirements of the RFP. Proposals that do not include all elements requested in Section C.6 Proposed Business Solution will be considered non-responsive and will not pass this gate.

Proposals must score at least 60% of the available points to advance through this evaluation stage. Proposals that meet the minimum criteria for this section will be scored and points included in the total to determine final rankings of responsive proposals. If the overall proposal includes more than one proposed business solution/project plan, each will be scored independent of the others. In other words, the Bidder may have one business solution/project plan rejected, but this will not affect the business solution/project plan for the others submitted.

Financial Proposal; points awarded

Bidder's Cost Proposal will be evaluated to determine the suitability of the proposal. Proposals that do not include all elements requested in Section C.7 Financial Proposal will be considered non-responsive and will not pass this gate. Additionally, if there are discrepancies between the Total Cost proposal compared to Performance Based Contracting Deliverables Schedule for total costs, the proposal will be considered non-responsive and will not pass this gate.

Financial Proposal Evaluation: One per Consultant’s proposal

40% of the available points will be awarded for evidence that the Financial Proposal is comprehensive and inclusive of performing all services necessary to accomplish the objectives of the contract. Proposals must score at least 60% of the available points in this section to advance through this evaluation stage. Proposals that meet the minimum criteria for this section will be scored and points included in the total to determine final rankings of responsive proposals.

Each proposal will move forward in the evaluation process as a separate proposal. Each individual proposal will be evaluated for minimum criteria in the next gate and scored accordingly. This allows OSPI to equitably evaluate the proposed business solution for each Work Section to determine rankings and awards.

Cost Proposal Workbook: One per Work Section included in Consultant’s proposal

60% of the available points will be awarded on a ranking basis for total cost evaluation:

The proposal with the lowest total cost, including development and three years of maintenance and operations costs, will receive the maximum cost evaluation points. Bidders with higher proposals will receive proportionately fewer cost evaluation points based upon the lowest proposal cost as follows:

$$\text{low bid} / \text{higher bid} = \% \text{ of avail. points awarded} * \text{avail. points} = \text{total cost points}$$

Example of points, not actual points:

	Bidder A	Bidder B
Total Proposal Cost	\$4,500,000.00 (Low bid)	\$5,000,000.00
% of available points awarded	100%	90%
Cost points (600 available)	600	540

Proposals that meet the minimum criteria for the Financial Proposal Evaluation will be scored and points included in the total to determine final rankings of responsive proposals.

Project Demonstrations – points awarded

The scores from the written evaluation sections combined together will determine the ranking of all Bidders. OSPI, at its sole discretion, may request that one or more top bidders who have passed all previous evaluation gates participate in a presentation or demonstration. OSPI will contact the top-scoring bidder(s) to schedule a date, time, and location. Bidder(s) is/are encouraged to hold the date(s) indicated in the Estimated Schedule of Procurement Activities. OSPI will provide further instruction at the time of scheduling demonstrations/interviews. Commitments made by the Bidder at the interview/demonstration, if any, will be considered binding.

Bidders are not required to respond to the Demonstration Scenarios as part of the initial proposal response. They are provided for Bidders' reference in Attachment C. Bidders are encouraged to review the demonstration scenarios in preparation for this stage of the Request for Proposals process.

30% of the total proposal points will be awarded in this section.

Technical Integration Plan – points awarded

Bidder's Technical Integration Plan will be evaluated to determine the suitability of the proposal. Proposals will be scored based on all elements requested in Section C.8 Technical Integration Plan.

10% of the total proposal points will be awarded in this section.

B.22. D.2. EVALUATION AND SCORING

The following points will be assigned to the proposals for evaluation purposes:

Category	Maximum Points Possible
Responsive to Minimum Qualifications and Requirements	Pass/Fail
Responsible Bidder	Pass/Fail
Management Proposal: Must earn minimum 60% of available points	Pass/Fail; 15% points
Relevant Experience	45
Related Contracts	21
Work Samples	21
Management Structure/Team Controls	21
Organizational Change Management	21
Past Performance/Reference Checks	21
Technical Approach: Must earn minimum 60% of available points	Pass/Fail; 15% points
Project Approach/Methodology	45
Risk Management	21
WaTech Compliance	30
Data Handling Strategy	30
Outcomes and Performance Measurement	24
Business Solution: Must earn minimum 60% of available points	Pass/Fail; 20% points

Category	Maximum Points Possible
Work Plan	20
Requirements Review	60
Project Schedule	20
Deliverables Based Schedule	20
Business Continuity Plan	30
Training and Knowledge Transfer	30
Project Risks	20
Subtotal	50% of points (500)
Financial Proposal Must earn minimum 60% of available Quality points	Pass/Fail; 20% points
Quality of Cost Proposal	80
Comparative cost-effectiveness Ranking Points	120
Interview or Demonstration	20% points
Work Section Demonstration	200
Technical Integration Plan	10% points
Technical Compatibility and Centralized Architecture	20
Minimize Inter-Vendor Dependencies	20
Cost Efficiency	20
Data Integrity, Security, and Compliance	20
Governance, Testing, and Support	20
TOTAL POINTS POSSIBLE	100% points (1000)
Scoring Preferences	10% additional points
Veteran Preference	50
Small Business Preference	50
TOTAL POINTS POSSIBLE	110% points (1100)

D.3. SCORING PREFERENCES

OSPI will apply the following Washington State procurement priorities and preferences to this RFP which will impact the evaluation of bids for this RFP:

Preference Related to Certified Veteran-Owned Businesses

In furtherance of Washington's business inclusion goals, OSPI will evaluate bids for best value and will provide a 5% bid preference to any bidder who certifies that Bidder qualifies as a Washington Department of Veterans' Affairs Certified Veteran-Owned Business under [RCW 43.60A.190](#).

Bidders may contact the [Washington State Department of Veterans' Affairs](#) (WDVA) for information regarding Certified Veteran-Owned businesses or to become a Certified Veteran-Owned Business. The WDVA can be reached by telephone, (360) 725-2169, or through their website at [WDVA](#). If you qualify as a Washington Small Business, identify yourself as such in WEBS and on the Contract Intake Form attached to your proposal.

Preference Related to Washington Small Businesses

In furtherance of Washington's business inclusion goals OSPI will evaluate bids for best value and will provide a 5% bid preference to any bidder who certifies that Bidder qualifies as a "Washington Small Business" as set forth in [RCW 39.26.010](#) and below. If you qualify as a Washington Small Business, identify yourself as such in WEBS and on the Contract Intake Form attached to your proposal. Contact WEBS Customer Service at 360-902-7400 for assistance.

- Bidder's principal office/place of business must be located in and identified as being in the State of Washington. A principal office or principal place of business is a firm's headquarters where business decisions are made and the location for the firm's books and records as well as the firm's senior management personnel.
- Bidder must be owned and operated independently from all other businesses and qualify as one of the following:
 - Small Business – i.e.,
 - Bidder has fifty or fewer employees; or
 - Bidder has an annual gross revenue of less than \$7,000,000 as reported on Bidder's federal income tax return or its return filed with the Washington State Department of Revenue over the previous three consecutive years.
 - Minibusiness – i.e., Bidder has an annual gross revenue of less than \$3,000,000, but \$1,000,000 or more, as reported on Bidder's federal income tax return or its return filed with the Washington State Department of Revenue.

- Microbusiness – i.e., Bidder has an annual gross revenue of less than \$1,000,000 as reported on Bidder's federal income tax return or its return filed with the Washington State Department of Revenue.

D.4. SELECTION OF APPARENT SUCCESSFUL BIDDER

OSPI reserves the right to award the contract to the Bidder(s) whose proposal is deemed to be in the best interest of and most advantageous to OSPI and the state of Washington. The selected bidder will be declared the Apparent Successful Bidder (ASB).

The date of announcement of the ASB will be the date the announcement is emailed. The State will enter into contract negotiations with the ASB. Should contract negotiations fail to be completed within two weeks after initiation, the State may immediately cease contract negotiations, declare the Bidder with the second highest score as the new ASB, and enter into contract negotiations with that Bidder. This process will continue until the Contracts are signed or no qualified Bidders remain. Alternatively, OSPI reserves the right to cancel this solicitation and not award a contract to any Bidder.

Upon OSPI's announcement of ASB, all bid submissions and all bid evaluations are subject to public disclosure pursuant to Washington's Public Records Act.

Following announcement of ASB, the agency will publicly post awarded bid(s) and bid award documents to its [website](#).

D.5. NOTIFICATION OF BIDDERS

Proposals that have not been selected for further negotiation or award will be notified via email by the RFP Coordinator.

D.6. DEBRIEFING WITH UNSUCCESSFUL BIDDERS

At the Bidder's request, an individual debriefing conference will be scheduled with an unsuccessful Bidder. A Debrief Conference is an opportunity for a bidder and OSPI to meet and discuss the bidder's bid (and, as further explained below, is a necessary prerequisite to filing a protest). Following the bid evaluation, OSPI will issue an ASB announcement. The request for a debriefing conference must be received by the RFP Coordinator within three business days following announcement of the ASB. The debriefing must be held within three business days of the request, unless otherwise agreed upon by OSPI and Bidder.

Discussion will be limited to a critique of the requesting Bidder's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debrief conferences may be conducted either in person at OSPI's office in Olympia, Washington, or virtually (e.g., by telephone or web-based virtual meeting such as Zoom, Skype, MS Teams), as determined by OSPI, and may be limited by OSPI to a specified period of time.

Since debriefing conferences pertain to the formal evaluation process, Bidders who were disqualified as non-responsive and therefore did not go through the formal evaluation process, are not entitled to a debriefing conference.

Please note, because the debrief process must occur before making an award, OSPI likely will schedule the Debrief Conference shortly after the announcement of the ASB and the Bidder's request for a Debrief Conference. OSPI will not allow the debrief process to delay the award. Therefore, Bidders should plan for contingencies and alternate representatives; Bidders who are unwilling or unable to attend the Debrief Conference will lose the opportunity to protest.

D.7. PROTEST PROCEDURE

This protest procedure is available to Bidders who submitted a response to this RFP document and who have participated in a Debriefing Conference. Upon completion of the debriefing conference, the Consultant is allowed five business days to file a protest of the procurement with the RFP Coordinator. Protests shall be submitted to the RFP Coordinator via email.

Consultants 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.

The protest must state:

1. The RFP number.
2. The grounds for the protest including specific facts and complete statements of the action(s) being protested. The protesting party may submit with the protest any documents or information deemed relevant.
3. 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 the evaluator/evaluation team;
- Errors in computing the score; and/or
- Non-compliance with procedures described in the procurement document or OSPI 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, 2) OSPI's assessment of its own and/or other agencies needs or requirements, or 3) a complaint raised during the Complaint Procedure.

Upon receipt of a protest, a protest review will be held by OSPI.

1. The agency will assign a Protest Officer who had no involvement in the evaluation and award process to investigate and respond to the protest.
2. The Protest Officer will consider the available facts and issue a written response to the Bidder within ten business days after receipt of the protest, unless additional time is needed. OSPI will notify the protesting bidder in writing if additional time is needed.
3. A copy of the protest and the agency's written decision will be provided to the Superintendent of Public Instruction and the Director of DES.

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

The final determination of the protest shall result in one of the following:

- Finding that the protest lacking in merit and uphold OSPI's action; or
- Finding that only technical or harmless errors in OSPI's procurement process and determining OSPI to be in substantial compliance and reject the protest; or
- Finding merit in the protest and providing OSPI options, which may include:
 - Correcting the errors and re-evaluating all proposals, and/or
 - Reissuing the RFP document and beginning a new process, or
 - Making other findings and determining other courses of action, as appropriate.

If OSPI determines that the protest is without merit, OSPI will enter into a contract with the Apparent Successful Bidder, assuming the parties reach agreement on the contract's terms. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken. All decisions made by OSPI relating to the protest shall be final.

D.8. ADDITIONAL AWARDS

OSPI reserves the right, during the resulting Contract term, to make additional Contract awards to responsive, responsible bidders who provided a bid but who were not awarded a Contract under this RFP. Such awards would be on the same or substantially similar terms and conditions and would be designed to address an awarded Consultant vacancy (e.g., an awarded Consultant is terminated or goes out of business) or be in the best interest of the State of Washington.

SECTION E: RFP EXHIBITS

Exhibit A Certifications and Assurances

Exhibit B Qualification Affirmations

Exhibit C Sample Contract

Exhibit D General Terms and Conditions

Exhibit E Data Sharing Terms and Conditions

Exhibit F Contract Issues List

Exhibit G OSPI Americans with Disabilities Act Compliance: Graphics and Colors

Exhibit H Consultant Intake Form

Exhibit I Proposal Checklist

EXHIBIT A: CERTIFICATIONS AND ASSURANCES

Available as a fillable form on [OSPI's procurement website](#).

Bidder must sign and include the full text of this Exhibit A with their proposal.

Bidder makes 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. The Bidder declares 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, Bidder 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 ninety business days following receipt, and it may be accepted by OSPI without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the ninety-day business period.
4. In preparing this proposal, the Bidder has 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. The Bidder understands that OSPI will not reimburse Bidder for any costs incurred in the preparation of this proposal. All proposals become the property of OSPI, and Bidder claims no proprietary right to the ideas, writings, items, or samples, unless stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by Bidder prior to opening, directly or indirectly, to any other Bidder or to any competitor.
7. The Bidder agrees that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, Bidder has described those exceptions in detail on the Contract Issues Exhibit.
8. No attempt has been made or will be made by the Bidder to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

9. The Bidder grants OSPI the right to contact references and others, who may have pertinent information regarding the Bidder's prior experience and ability to perform the services contemplated in this procurement.
10. The Bidder acknowledges that if awarded a contract with OSPI, the Bidder is required to comply with all applicable state and federal civil rights and other laws. Failure to comply may result in Contract termination. the Bidder agrees to submit additional information about its nondiscrimination policies, at any time, if requested by OSPI.
11. The Bidder certifies that the Bidder has not, within the three-year period immediately preceding the date of release of this competitive solicitation, been determined by a final and binding citation and notice of assessment issued by the Department of Labor and Industries or through a civil judgment to have willfully violated state minimum wage laws (RCW 49.38.082; Chapters 49.46 RCW, 49.48 RCW, or 49.52 RCW).
12. The Bidder has not been debarred or otherwise restricted from participating in any public contracts.
13. The Bidder certifies that the Bidder has not willfully violated Washington State's wage payment laws within the last three years.
14. The Bidder acknowledges its obligation to notify OSPI of any changes in the certifications and assurances above.

I certify under penalty of perjury of the laws of the State of Washington that the foregoing is true and correct.

_____ Signature of Bidder	_____ Date	_____ Place Signed (City, State)
_____ Print Name	_____ Title	_____ Organization Name

EXHIBIT B: QUALIFICATION AFFIRMATIONS

Available as a fillable form on [OSPI's procurement website](#).

CONSULTANT INFORMATION	
Bidder:	

MINIMUM QUALIFICATIONS
<p>Consultants who do not meet the minimum qualifications noted above will be rejected as non-responsive and will not receive further consideration. Any proposal that is rejected as non-responsive will not be evaluated or scored.</p> <p><i>Please check all boxes that apply.</i></p> <p><input type="checkbox"/> Licensed to do business in the State of Washington. If not licensed, provide a written intent to become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Consultant.</p> <p><input type="checkbox"/> Consultant must demonstrate experience developing at least one (1) sizeable financial system using the architectural approach described in the bidder's response.</p>

ADDITIONAL DESIRED QUALIFICATIONS
<p><i>Please check all boxes that apply.</i></p> <p><input type="checkbox"/> Consultants with experience, knowledge, or demonstrated abilities in developing school district data collection systems, school district budget and accounting reporting or in school district funding distribution systems are desired.</p>

I certify under penalty of perjury of the laws of the State of Washington that the foregoing is true and correct.

Signature of Bidder Date Place Signed (City, State)

Print Name Title Organization Name

EXHIBIT C: SAMPLE CONTRACT

Contract No. _____

between

**SUPERINTENDENT OF PUBLIC INSTRUCTION,
STATE OF WASHINGTON**

(hereinafter referred to as Superintendent/OSPI)

Old Capitol Building, P.O. Box 47200

Olympia, WA 98504-7200

and

>CONTRACTOR<

(hereinafter referred to as Consultant)

>ADDRESS<

>Federal Identification #<

>Unified Business Identifier #<

In consideration of the promises and conditions contained herein, Superintendent and Contractor do mutually agree as follows:

I. DUTIES OF THE CONTRACTOR

I.A. **General Objective.** The general objective(s) of this contract is/are as follows:

>OBJECTIVE PLACEHOLDER<

I.B. **Scope of Work.** In order to accomplish the general objective(s) of this Contract, Consultant shall perform the following specific duties, and those outlined in OSPI's Request for Proposals No. 2026-12, and Contractor's Proposal, to the satisfaction of the OSPI Contract Manager:

>SCOPE OF WORK PLACEHOLDER<

I.C. The Consultant shall produce the following written reports or other written documents (deliverables) by the dates indicated below:

>DELIVERABLES PLACEHOLDER<

All written reports/documents required under this contract must be delivered to the OSPI Contract Manager in accordance with the schedule above.

I.D. *If deliverables will be posted to the OSPI website or include a communications component (video, broadly distributed communication, etc.), the following section will be included.* **ADA Compliance:** All documents, videos, audio records, presentations, or other deliverables required under the resulting Contract shall be produced in format, compliant with the Americans With Disabilities Act and follow the Web Content Accessibility Guidelines

(WCAG) 2.0, OSPI's formatting standard specified in Attachment – OSPI Americans with Disabilities Act Compliance: Graphics and Colors, OSPI's Brand Use Policy, OSPI's Style Guide, and OSPI's Videography Style Guide which are hereby incorporated by this reference. For narrative or documentary style videos required under the resulting Contract, the final product and all raw footage shall be mailed to the OSPI Communication and Digital Media office on a hard drive furnished by the Consultant. In the event that the deliverables are not compliant, OSPI may require Consultant to promptly make modifications that will make the deliverables compliant. Additionally, OSPI shall have the right to modify or copy the deliverables in order to make them accessible and/or compliant.

I.E. *If data is a component of the scope of work, the following section may be included.* **Data**

Compliance: OSPI agrees to share student data with the Consultant in order to fulfill the work prescribed under this Contract. Therefore, Consultant shall comply with Attachment – Agreement to Authorize the Release and Use of Student-Level Data and Attachment – Statement of Confidentiality and Non-Disclosure before any data will be exchanged. Upon expiration or termination of this Contract, Consultant shall sign Attachment – Certification of Data Destruction and return to the OSPI Contract Manager within fifteen days of the date of disposal.

I.F. *If subcontractor(s) will be used, the following section will be included.* **Subcontracting.** This Contract is subject to compliance tracking using the State's business diversity management system, [Access Equity](#) (B2Gnow). The Consultant and all Subcontractors shall report and confirm receipt of payments made to the Consultant and each Subcontractor through the Access Equity system, per Subcontractor Payment Reporting requirements within Attachment A – General Terms and Conditions.

- Within fifteen days of contract commencement, the Consultant shall register and enter all required subcontractor information into the Access Equity system.
- Within twenty days of contract commencement, the Consultant shall complete the required user training.
- Within thirty days of payment from OSPI to the Consultant, the Consultant shall report the amount and date of all payments (i) received from the Superintendent, and (ii) paid to Subcontractors.

As such, OSPI hereby acknowledges Consultant will utilize the following subcontractors. Any additional subcontractors/substitutions of subcontractors shall be submitted to the OSPI Contract Manager in writing before performing any duties related to this Contract.

>**SUBCONTRACTOR PLACEHOLDER**<

>**SUBCONTRACTOR PLACEHOLDER**<

I.G. **Technology Compliance.** In the event the Contractor has access to OSPI's building, equipment, data, or network, Contractor shall comply with the following policies:

- Contractor shall complete the IT Security Training within ten (10) business days after the contract is effective. OSPI will grant the Contractor access to the Learning Center and assign the course.
- Contractor shall comply with OSPI's Technology Acceptable Use Policy. A signed copy of the policy shall be submitted to the OSPI Contract Manager within ten (10) business days after the contract is effective.
- Contractor shall comply with OSPI's Email Retention Policy. A signed copy of the policy shall be submitted to the OSPI Contract Manager within ten (10) business days after the contract is effective.
- Contractor shall comply with OSPI's Student Data Confidentiality Policy and Data and Information Handling and Disposal Policy. A signed copy of the policies shall be submitted to the OSPI Contract Manager within ten (10) business days after the contract is effective. Contractor shall also sign and return Statement of Confidentiality and Non-Disclosure, and Certification of Data Destruction, as applicable.

II. PERIOD OF PERFORMANCE

No costs shall be incurred under this Contract until fully executed and subsequent to the termination date.

The schedule of performance of Consultant's duties is as follows:

>**START DATE**<, or date of execution, whichever is later, through >**START DATE**<.

Superintendent has the right to renew this Contract in whole or in part for the year(s) [renewal year(s)] by giving notice to the Consultant. If Superintendent provides such notice to the Consultant, the Consultant shall be obligated to enter into a contract with the same fiscal obligations as the previous Contract year, provided that Superintendent and Consultant shall negotiate any revision of additional services or goals beyond those encompassed in the previous Contract.

III. INVOICING & PAYMENT

III.A.1. **Compensation Amount.** In consideration of Consultant's satisfactory performance of the duties set forth herein, Superintendent shall compensate Consultant at a rate not to exceed a total of \$\$. Payment for satisfactory performance shall not exceed this amount unless the parties mutually agree to a higher amount prior to the commencement of any work, which will cause the maximum payment to be increased.

III.A.2. *If Applicable:* **Travel Expense Reimbursement.** Travel and per diem expenses for [#] person(s) in the amounts and for the purposes otherwise established for state employees at the time of incurrence by the rules and regulatory policies of the [Office of Financial Management \(OFM\)](#) shall not exceed [write out full dollar amount] dollars (\$).

Contractor's "official duty station" (i.e., the origin of reimbursable travel and/or per diem) shall be [official duty station].

III.A.3. **If Applicable: Expense Reimbursement.** Expenses incurred for the following specified purposes shall not exceed a total of [write out full dollar amount] dollars (\$). Contractor must submit receipts and/or other documentation.

III.A.4. **Funding Source.** Funds for the payment of this Contract are provided by state dollars.

III.B.1. Payment shall be made to the Consultant as follows:

>PAYMENT SCHEDULE PLACEHOLDER<

III.B.2. **Invoice Requirements.** The invoice(s) shall document to the OSPI Contract Manager's satisfaction a description of the work performed and payment requested. Within approximately thirty (30) calendar days of the OSPI Contract Manager receiving and approving the invoice, payment will be mailed or electronically transferred to the Contractor by Agency Financial Services, OSPI.

The invoice(s) must be emailed to the OSPI Contract Manager and shall include:

- OSPI Contract number
- Contractor name, address, telephone number, and email address for billing issues if someone other than the Contractor's Contract Manager
- Contractor's Federal Tax Identification Number
- Contractor's Statewide Vendor Number
- Description of Services and Deliverables provided
- Date(s) of Service, if applicable
- Invoice amount for each Service or Deliverable, including applicable taxes

Contractor's invoices for payment shall reflect accurate Contract prices. Invoices will not be processed for payment until receipt of a complete invoice as specified herein. OSPI shall have no obligation to pay Contractor for any services that do not comply with this Contract.

III.B.3. **Errors & Corrections.** If errors are found in the submitted invoice or supporting documents, the OSPI Contract Manager will notify the Contractor. In order to receive payment, it shall be the responsibility of the Contractor to make corrections in a timely manner, resubmit the invoice and/or supporting documentation as requested, and notify the OSPI Contract Manager.

III.B.4. **Final Payment.** Final payment shall be made after acceptance by the OSPI Contract Manager if received by within sixty (60) days after the Contract expiration date, unless negotiated with the OSPI Contract Manager and the Fiscal Budget Analyst. There will be no obligation to pay any claims that are submitted sixty-one (61) or more calendar days after the expiration date ("Belated Claims"). Belated Claims will be paid at OSPI's sole discretion, and any such potential payment is contingent upon the availability of funds.

IV. CONTRACT MANAGEMENT

The following shall be the contact person for all communications and billings regarding the performance of this contract. Any changes to this information shall be communicated to the other party in writing as soon as reasonably possible.

Consultant	OSPI
[Contract Manager's Name]	[Contract Manager's Name]
[Contract Manager's Title]	[Contract Manager's Title]
[Contract Manager's Address]	OLH Building, PO Box 47200 Olympia, WA 98504-7200
Phone: () -	Phone: () -
Email: [Contract Manager's Email Address]	Email: [Contract Manager's Email Address]

V. INCORPORATION OF ATTACHMENTS AND ORDER OF PRECEDENCE

Each of the attachments listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this contract, the inconsistency shall be resolved by giving precedence in the following order:

- Applicable Federal and state of Washington statutes and regulations
- Special Terms and Conditions as contained in this basic contract instrument
- Attachment A – Contract for Services, General Terms and Conditions
- Attachment B – Request for Proposals with any formal RFP amendments that change scope of work, etc.
- Attachment C – Consultant's Proposal
- Any other provision, term or material incorporated herein by reference or otherwise incorporated.

VI. APPROVAL

This contract shall be subject to the written approval of the Superintendent's authorized representative and shall not be binding until so approved. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

We the undersigned agree to the terms of the foregoing contract.

CONTRACTOR

Superintendent of Public Instruction

State of Washington

Signature Title

Contracts Administrator

Print Name Date

Date

Who certifies that he/she is the
Consultant identified herein, OR a person
duly qualified and authorized to bind the
Consultant so identified to the foregoing
Agreement.

Approved as to FORM ONLY
by the Assistant Attorney General

EXHIBIT D: GENERAL TERMS AND CONDITIONS

Definitions. As used throughout this Contract and General Terms and Conditions, the following terms shall have the meaning set forth below:

"Contract" or "Agreement" means the entire written agreement between OSPI and the Contractor, including any attachments, exhibits, documents, or materials incorporated by reference. Contract and Agreement may be used interchangeably.

"Contractor" shall mean that firm, provider, organization, individual, or other entity performing service(s) under this Contract, and shall include all employees of the Contractor.

"Services" means all work performed or provided by Contractor pursuant to this Contract.

"Statement of Work" or "SOW" or "Scope of Work" means a detailed description of the work activities the Contractor is required to perform under the terms and conditions of this Contract, including the deliverables and timeline.

"Subcontractor" shall mean one not in the employment of the Contractor, who is performing all or part of those services under this Contract under a separate contract with the Contractor. The terms "Subcontractor" and "Subcontractors" means Subcontractor(s) in any tier.

"Superintendent" shall mean the Office of Superintendent of Public Instruction (OSPI) of the State of Washington, any division, section, office, unit or other entity of the Superintendent, or any of the officers or other officials lawfully representing the Superintendent. Superintendent and OSPI may be used interchangeably.

- 1. Access to Data.** In compliance with Chapter 39.26 RCW, the Contractor shall provide access to data generated under this Contract to the Superintendent, the Joint Legislative Audit and Review Committee, and the State Auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the Contractor's reports, including computer models and methodology for those models.
- 2. Alterations and Amendments.** This Contract may be amended only by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.
- 3. Americans with Disabilities Act (ADA) of 1990, Public Law 101-336, also referred to as the "ADA" 28 CFR Part 35.** The Contractor must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.

4. **Assignment.** Neither this Contract, nor any claim arising under this Contract, shall be transferred or assigned by the Contractor without prior written consent of the Superintendent.
5. **Assurances.** The Superintendent and the Contractor agree that all activity pursuant to this Contract will be in accordance with all applicable current federal, state and local laws, rules and regulations.
6. **Attorney's Fees.** In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney's fees and costs.
7. **Audit Requirements.** If the Contractor is a Subrecipient of federal awards as defined by the Office of Management and Budget (OMB) CFR, Part 200, Subpart F, and expends seven hundred and fifty thousand dollars (\$750,000) or more in federal awards (does not apply to contracts for goods and services) from all federal sources in any fiscal year beginning on or after December 26, 2014, the Contractor shall procure at their expense a single or program-specific audit for that year. The Contractor shall incorporate OMB CFR, Part 200, Subpart F audit requirements into all contracts between the Contractor and its Subcontractors who are Subrecipients of federal awards. The Contractor shall comply with any future amendments to OMB and any successor or replacement Circular or regulation.
8. **Budget Revisions.** Any monetary amount budgeted by the terms of this Contract for various activities and line-item objects of expenditure may be revised without prior written approval of Superintendent, so long as the revision is no more than ten percent (10%) of the original line item amount and the increase in an amount is offset by a decrease in one or more other amounts equal to or greater than the increase. All other budget revisions exceeding ten percent (10%) shall only be made with the prior written approval of the Superintendent.
9. **Certification Regarding Debarment, Suspension, and Ineligibility.** The Contractor certifies that neither it nor its principals are debarred, suspended, proposed for debarment, or voluntarily excluded from participation in transactions by any federal department or agency. The Contractor further certifies that they will ensure that potential subcontractors or any of their principals are not debarred, suspended, proposed for debarment, or voluntarily excluded from participation in covered transactions by any federal department or agency. "Covered transactions" include procurement contracts for goods that are expected to equal or exceed twenty-five thousand dollars (\$25,000). Contractor may do so by obtaining a certification statement from the potential subcontractor or subrecipient or by checking online at the System for Award Management (SAM), Excluded Parties List. The Contractor shall immediately notify the Superintendent if, during the term of this contract, Contractor becomes debarred. The Superintendent may immediately terminate this Contract by providing Contractor written notice if Contractor becomes debarred during the term of this Contract.

The Contractor also certifies that neither it nor its principals are debarred, suspended, or proposed for debarment from participation in transactions by any state department or agency. The Contractor further certifies that they will ensure that potential subcontractors or

any of their principals are not debarred, suspended, or proposed for debarment from participation in covered transactions by any state department or agency.

10. Certification Regarding Lobbying. The Contractor certifies that Federal-appropriated funds will not be used to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress or an employee of a member of Congress in obtaining any Federal contract, grant or any other award covered by 31 USC 1352. Contractor must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Contractor shall require its subcontractors to certify compliance with this provision.

11. Certification Regarding Wage Violations. The Contractor certifies that within three (3) years prior to the date of execution of this Contract, Contractor has not been determined by a final and binding citation and notice of assessment issued by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in RCW 49.48.082, any provision of RCW chapters 49.46, 49.48, or 49.52.

The Contractor further certifies that it will remain in compliance with these requirements during the term of this Contract. Contractor will immediately notify the Superintendent of any finding of a willful violation entered by the Washington Department of Labor and Industries or through a civil judgment entered by a court of limited or general jurisdiction entered during the term of this Contract.

12. Change in Status. In the event of substantive change in the legal status, organizational structure, or fiscal reporting responsibility of the Contractor, Contractor agrees to notify the Superintendent of the change. Contractor shall provide notice as soon as practicable, but no later than thirty (30) days after such a change takes effect.

13. Confidentiality. The Contractor acknowledges that all of the data, material and information which originates from this Contract, and any student assessment data, material and information which will come into its possession in connection with performance under this Contract, consists of confidential data owned by the Superintendent or confidential personally identifiable data subject to the federal Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) or other privacy laws, and that the data must be secured and protected from unauthorized disclosure by the Contractor. The Contractor is wholly responsible for compliance with FERPA requirements.

The Contractor, therefore, agrees to hold all such material and information in strictest confidence, not to make use thereof other than for the performance of this Contract, to release it only to authorized employees and agents requiring such information and not release or disclose it to any other party. The Contractor agrees to release such information or material only to employees and agents who have signed a written agreement expressly prohibiting disclosure or usages not specifically authorized by this Contract.

14. Copyright Provisions. Unless otherwise provided, all Materials produced under this Contract shall be considered "works for hire" as defined by the U.S. Copyright Act and copyright shall be owned by the Superintendent. The Superintendent shall be considered the author of such Materials. If Materials are not considered "works for hire", Contractor hereby irrevocably assigns all right, title, and interest in Materials, including all intellectual property rights, to the Superintendent effective from the moment of creation of such Materials.

Materials means all items in any format and includes, but is not limited to, data, reports, documents, pamphlets, advertisements, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Copyright ownership includes the right to patent, register and the ability to transfer these rights.

Contractor understands that, except where otherwise agreed to in writing or approved by the Superintendent or designee, all original works of authorship produced under this Contract shall carry a [Creative Commons Attribution License](#), version 4.0 or later.

All Materials the Contractor has adapted from others' existing openly licensed resources must be licensed with the least restrictive open license possible that is not in conflict with existing licenses.

For Materials that are delivered under the Contract, but that incorporate pre-existing materials not produced under the Contract, Contractor will license the materials to allow others to translate, reproduce, distribute, prepare derivative works, publicly perform, and publicly display. If the Contractor would like to limit these pre-existing portions of the work to [non-commercial use](#), the [Creative Commons Attribution-NonCommercial](#) (preferred) or [Creative Commons Attribution-NonCommercial-ShareAlike](#) licenses, version 4.0 or later, are acceptable for these specific sections.

The Contractor warrants and represents that Contractor has all rights and permissions, including intellectual property rights, moral rights and rights of publicity, necessary to apply such a license.

The Contractor shall exert all reasonable effort to advise the Superintendent, at the time of delivery of data furnished under this Contract, of all known or potential invasions of privacy contained therein and of any portion of such document which was not produced in the performance of this Contract. The Superintendent shall receive prompt written notice of each notice or claim of infringement received by the Contractor with respect to any data delivered under this Contract. The Superintendent shall have the right to modify or remove any restrictive markings placed upon the data by the Contractor.

15. Covenant Against Contingent Fees. The Contractor warrants that no person or selling agent has been employed or retained to solicit or secure this Contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, excepting bona fide employees or bona fide established agent maintained by the Contractor for the purpose of

securing business. The Superintendent shall have the right, in the event of breach of this clause by the Contractor, to annul this Contract without liability or, in its discretion, to deduct from the contract price or consideration or recover by other means the full amount of such commission, percentage, brokerage or contingent fees.

16. Disputes. In the event that a dispute arises under this Contract, it shall be determined by a Dispute Board in the following manner: (1) The Superintendent shall appoint a member to the Dispute Board; (2) the Contractor shall appoint a member to the Dispute Board; (3) the Superintendent and the Contractor shall jointly appoint a member to the Dispute Board; (4) the Dispute Board shall evaluate the dispute and make a determination of the dispute; and, the determination of the Dispute Board shall be final and binding on the parties hereto.

As alternatives to the above Dispute Board process: (1) if the dispute is between two or more state agencies, any one of the agencies may request intervention by the Governor, as provided by 43.17.330 RCW, in which event the Governor's process shall control; and, (2) if the dispute is between a non-state agency and another state agency or non-state agency party to this Contract, all the disputing parties may mutually agree to mediation prior to submitting the dispute to a Dispute Board in the event the dispute is not resolved pursuant to mediation within an agreed-upon time period.

17. Duplicate Payment. The Superintendent shall not pay the Contractor, if the Contractor has charged or will charge the state of Washington or any other party under any other contract or agreement, for the same services or expenses.

18. Electronic signature. Any signature page delivered via fax machine or electronic image scan, receipt acknowledged in each case, shall be binding to the same extent as an original, wet ink signature page. Any Party who delivers such a signature page agrees to later deliver an original counterpart to any Party which requests it.

19. Entire Agreement. This Contract contains all the terms and conditions agreed upon by the parties. No other understandings, oral or otherwise, regarding the subject matter of this Contract shall be deemed to exist or to bind any of the parties hereto.

20. Ethical Conduct. Neither the Contractor nor any employee or agent of the Contractor shall participate in the performance of any duty or service in whole or part under this Contract in violation of, or in a manner that violates any provision of the Ethics in Public Service law at Chapter 42.52 RCW, RCW 42.17A.550, RCW 42.17A.555, and 41.06.250 prohibiting the use of public resources for political purposes.

Contractor represents and warrants that it complies fully with all applicable procurement ethics restrictions including, but not limited to, restrictions against Contractor providing gifts or anything of economic value, directly or indirectly, to the Superintendent's employees.

21. Governing Law and Venue. This Contract shall be construed and interpreted in accordance with the laws of the State of Washington and the venue of any action brought hereunder shall be in Superior Court for Thurston County.

22. Indemnification. To the fullest extent permitted by law, Contractor shall indemnify, defend and hold harmless the Superintendent and all officials, agents, and employees of the Superintendent, from and against all claims for injuries or death arising out of or resulting from the performance of this Contract. "Claim" as used in this Contract, means any financial loss, claim, suit, action, damage, or expense, including but not limited to attorney's fees, attributable for bodily injury, sickness, disease, or death, or injury to or destruction of tangible property including loss of use resulting therefrom. Additionally, "claims" shall include but not be limited to, assertions that the use or transfer of any software, book, document, report, film, tape or sound reproduction or material of any kind, delivered hereunder, constitutes an infringement of any copyright, patent, trademark, trade name, or otherwise results in an unfair trade practice or in unlawful restraint of competition. Contractor's obligation to indemnify, defend and hold harmless includes any claim by Contractor's agents, employees, representatives, or any subcontractor or its employees.

Contractor expressly agrees to indemnify, defend, and hold harmless the Superintendent for any and all claims, costs, charges, penalties, demands, losses, liabilities, damages, judgments, or fines out of or incident to Contractor's or subcontractor's performance or failure to perform the Contract. Contractor's obligation to indemnify, defend, or hold harmless the Superintendent shall not be eliminated or reduced by any actual or alleged concurrent negligence by Superintendent or its agents, employees, or officials.

Contractor waives its immunity under Title 51 RCW to the extent it is required to indemnify, defend and hold harmless Superintendent and its agents, employees, or officials.

23. Independent Capacity of the Contractor. The parties intend that an independent Contractor relationship will be created by this Contract. The Contractor and his/her employees or agents performing under this Contract are not employees or agents of the Superintendent. The Contractor will not hold himself/herself out as nor claim to be an officer or employee of the Superintendent or of the state of Washington by reason hereof, nor will the Contractor make any claim or right, privilege, or benefit which would accrue to such employee under law. Conduct and control of the work will be solely with the Contractor.

24. Insurance.

- a. **Worker's Compensation Coverage.** The Contractor shall at all times comply with all applicable worker's compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the fullest extent applicable. This requirement includes the purchase of industrial insurance coverage for the Contractor's employees, as may now hereafter be required of an "employer" as defined in Title 51 RCW. Such worker's compensation and occupational disease requirements shall include coverage for all employees of the Contractor, and for all employees of any subcontract retained by the

Contractor, suffering bodily injury (including death) by accident or disease, which arises out of or in connection with the performance of this Contract. Satisfaction of these requirements shall include, but shall not be limited to:

- 1) Full participation in any required governmental occupational injury and/or disease insurance program, to the extent participation in such a program is mandatory in any jurisdiction;
- 2) Purchase worker's compensation and occupational disease insurance benefits to employees in full compliance with all applicable laws, statutes, and regulations, but only to the extent such coverage is not provided under mandatory governmental program in "a" above, and/or;
- 3) Maintenance of a legally permitted and governmentally approved program of self-insurance for worker's compensation and occupational disease.

Except to the extent prohibited by law, the program of the Contractor's compliance with worker's compensation and occupational disease laws, statutes, and regulations in 1), 2), and 3) above shall provide for a full waiver of rights of subrogation against the Superintendent, its directors, officers, and employees.

If the Contractor, or any subcontractor retained by the Contractor, fails to effect and maintain a program of compliance with applicable worker's compensation and occupational disease laws, statutes, and regulations and the Superintendent incurs fines or is required by law to provide benefits to such employees, to obtain coverage for such employees, the Contractor will indemnify the Superintendent for such fines, payment of benefits to Contractor or subcontractor employees or their heirs or legal representatives, and/or the cost of effecting coverage on behalf of such employees. Any amount owed the Superintendent by the Contractor pursuant to the indemnity may be deducted from any payments owed by the Superintendent to the Contractor for the performance of this Contract.

- b. **Automobile Insurance.** In the event that services delivered pursuant to this Contract involve the use of vehicles, owned or operated by the Contractor, automobile liability insurance shall be required. The minimum limit for automobile liability is:

\$1,000,000 per accident or occurrence, using a Combined Single Limit for bodily injury and property damage.

- c. **Business Automobile Insurance.** In the event that services performed under this Contract involve the use of vehicles or the transportation of clients, automobile liability insurance shall be required. If Contractor-owned personal vehicles are used, a Business Automobile policy covering a minimum Code 2 "owned autos only" must be secured. If the Contractor's employees' vehicles are used, the Contractor must also include under the Business

Automobile policy Code 9, coverage for “non-owned autos.” The minimum limits for automobile liability is:

\$1,000,000 per accident or occurrence, using a Combined Single Limit for bodily injury and property damage.

- d. **Public Liability Insurance/General Liability.** The Contractor shall at all times during the term of this Contract, at its cost and expense, carry and maintain general public liability insurance, including contractual liability, against claims for bodily injury, personal injury, death, or property damage occurring or arising out of services provided under this Contract. This insurance shall cover such claims as may be caused by any act, omission, or negligence of the Contractor or its officers, agents, representatives, assigns or servants. The limits of liability insurance, which may be increased from time to time as deemed necessary by the Superintendent, with the approval of the Contractor (which shall not be unreasonably withheld), shall not be less than as follows:

Each Occurrence	\$1,000,000
General Aggregate Limits (other than products-completed operations)	\$2,000,000
Products-Completed Operations Limit	\$2,000,000
Personal and Advertising Injury Limit	\$1,000,000
Fire Damage Limit (any one fire)	\$ 50,000
Medical Expense Limit (any one person)	\$ 5,000

- e. **Technology Professional Liability (Errors & Omissions).** Contractor shall purchase and maintain technology professional liability insurance coverage. Such coverage shall be sufficiently broad to respond to the duties and obligations as undertaken by Contractor in this Contract and shall include, but not be limited to, claims involving infringement of intellectual property, including, but not limited to, infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion, and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations. Combined single limit per claim shall not be less than \$2,000,000 per occurrence and \$4,000,000 general aggregate.
- f. **Technology Professional Liability & Cyber Liability Insurance.** Contractor agrees to purchase and maintain throughout the term of this Contract a technology/professional liability insurance policy, including coverage for network security/data protection liability insurance (also called “cyber liability”) covering liabilities for financial loss resulting or arising from acts, errors, or omissions, in rendering technology/professional services or in connection with the specific services described in this Contract:

- 1) Violation or infringement of any right of privacy, including breach of security and breach of security/privacy laws, rules or regulations globally, now or hereinafter constituted or amended;
- 2) Data theft, damage, unauthorized disclosure, destruction, or corruption, including without limitation, unauthorized access, unauthorized use, identity theft, theft of personally identifiable information or confidential information in whatever form, transmission of a computer virus or other type of malicious code; and participation in a denial of service attack on third party computer systems;
- 3) Loss or denial of service;
- 4) No cyber terrorism exclusion;

with a minimum limit of \$3,000,000 each and every claim and in the aggregate. Such coverage must include technology/professional liability including breach of contract, privacy and security liability, privacy regulatory defense and payment of civil fines, payment of credit card provider penalties, and breach response costs (including without limitation, notification costs, forensics, credit protection services, call center services, identity theft protection services, and crisis management/public relations services).

Such insurance must explicitly address all of the foregoing without limitation if caused by an employee of Contractor or an independent contractor working on behalf of Contractor in performing services under this Contract. Policy must provide coverage for wrongful acts, claims, and lawsuits anywhere in the world. Such insurance must include affirmative contractual liability coverage for the data breach indemnity in this Contract for all damages, defense costs, privacy regulatory civil fines and penalties, and reasonable and necessary data breach notification, forensics, credit protection services, public relations/crisis management, and other data breach mitigation services resulting from a breach of confidentiality or breach of security by or on behalf of Contractor.

- g. **Cyber Risk Liability Insurance.** Contractor shall purchase and maintain cyber risk insurance on a claims made form. The policy shall include coverage for liability as a result of a data security breach or violation of consumer data protection laws arising out of Services provided under this Contract and resulting Purchase Orders - Limits are \$2,000,000 per occurrence and \$4,000,000 aggregate. The insurance coverage limits set forth herein are the minimum. Contractor's insurance coverage shall be no less than the minimum amounts specified. Coverage in the amounts of these minimum limits, however, shall not be construed to relieve Contractor from liability in excess of such limits.
- h. **Additional Insured.** The State of Washington, Office of Superintendent of Public Instruction, shall be specifically named as an additional insured on all policies except for liability insurance on privately-owned vehicles, and all policies shall be primary to any other valid and collectible insurance. The Superintendent may waive this requirement at its discretion. Policies and certificates of insurance shall include the contract reference number.

- i. **Proof of Insurance.** Certificates and or evidence satisfactory to the Superintendent confirming the existence, terms and conditions of all insurance required above shall be delivered to the Superintendent within five (5) days of the Contractor's receipt of Authorization to Proceed.
- j. **General Insurance Requirements.** Contractor shall, at all times during the term of the Contract and at its cost and expense, buy and maintain insurance of the types and amounts listed above. Failure to buy and maintain the required insurance may result in the termination of the Contract at the Superintendent's option. By requiring insurance herein, Superintendent 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 Superintendent in this Contract.

Contractor shall include all subcontractors as insureds under all required insurance policies, or shall furnish proof of insurance and endorsements for each subcontractor. Subcontractor(s) must comply fully with all insurance requirements stated herein. Failure of subcontractor(s) to comply with insurance requirements does not limit Contractor's liability or responsibility.

25. Licensing and Accreditation Standards. The Contractor shall comply with all applicable local, state, and federal licensing, accreditation and registration requirements/standards, necessary to the performance of this Contract.

26. Limitation of Authority. Only the Superintendent or the Superintendent's delegate by writing (delegation to be made prior to action) shall have the express, implied, or apparent authority to alter, amend, modify, or waive any clause or condition of this Contract. Furthermore, any alteration, amendment, modification, or waiver or any clause or condition of this Contract is not effective or binding unless made in writing and signed by the Superintendent.

27. Nondiscrimination.

- a. **Nondiscrimination Requirement.** During the term of this Contract, the Contractor, including any subcontractor, shall comply with all the federal and state nondiscrimination laws, regulations and policies, which are otherwise applicable to the Superintendent. Accordingly, on the bases enumerated at RCW 49.60.530(3), no person shall, on the ground of sex, race, creed, religion, color, national origin, marital status, families with children, age, veteran or military status, sexual orientation, gender expression, gender identity, disability, or the use of a trained dog guide or service animal, be unlawfully excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any activity performed by the Contractor and its agents under this Contract. In addition, Contractor, including any subcontractor, shall give written notice of this nondiscrimination requirement to any labor organizations with which Contractor, or subcontractor, has a collective bargaining or other agreement.

- b. **Obligation to Cooperate.** Contractor, including any subcontractor, shall cooperate and comply with any Washington state agency investigation regarding any allegation that Contractor, including any subcontractor, has engaged in discrimination prohibited by this Contract pursuant to RCW 49.60.530(3).
- c. **Default.** Notwithstanding any provision to the contrary, the Superintendent may suspend Contractor, including any subcontractor, upon notice of a failure to participate and cooperate with any state agency investigation into alleged discrimination prohibited by this Contract, pursuant to RCW 49.60.530(3). Any such suspension will remain in place until Superintendent receives notification that Contractor, including any subcontractor, is cooperating with the investigating state agency. In the event Contractor, or subcontractor, is determined to have engaged in discrimination identified at RCW 49.60.530(3), the Superintendent may terminate this Contract in whole or in part, and Contractor, subcontractor, or both, may be referred for debarment as provided in RCW 39.26.200. Contractor or subcontractor may be given a reasonable time in which to cure this noncompliance, including implementing conditions consistent with any court-ordered injunctive relief or settlement agreement.
- d. **Remedies for Breach.** Notwithstanding any provision to the contrary, in the event of Contract termination or suspension for engaging in discrimination, Contractor, subcontractor, or both, shall be liable for contract damages as authorized by law including, but not limited to, any cost difference between the original contract and the replacement or cover contract and all administrative costs directly related to the replacement contract, which damages are distinct from any penalties imposed under Chapter 49.60, RCW. The Superintendent shall have the right to deduct from any monies due to Contractor or subcontractor, or that thereafter become due, an amount for damages Contractor or subcontractor will owe the Superintendent for default under this provision.

28. Overpayments. Contractor shall refund to Superintendent the full amount of any overpayment under this Contract within thirty (30) calendar days of written notice. If Contractor fails to make a prompt refund, Superintendent may charge Contractor one percent (1%) per month on the amount due until paid in full.

29. Payments. No payments in advance or in anticipation of services or supplies to be provided under this Contract shall be made by the Superintendent. All payments to the Contractor are conditioned upon (1) Contractor's submission of a properly executed and supported invoice for payment, including such supporting documentation of performance and supporting documentation of costs incurred or paid, or both as is otherwise provided for in the body of this Contract, and (2) Acceptance and certification by the OSPI Contract Manager or designee of satisfactory performance by the Contractor.

Except as otherwise provided in this Contract, (1) All approvable invoices for payment due to the Contractor shall be paid within thirty (30) calendar days of their submission by the Contractor

and acceptance and certification by the OSPI Contract Manager or designee, and (2) All expenses necessary to the Contractor's performance of this Contract not specifically mentioned in the Contract shall be borne in full by the Contractor.

30. Public Disclosure. Contractor acknowledges that the Superintendent is subject to the Washington State Public Records Act, Chapter 42.56 RCW, and that this Contract shall be a public record as defined in RCW 42.56. Any specific information that is claimed by the Contractor to be confidential or proprietary must be clearly identified as such by the Contractor. To the extent consistent with chapter 42.56 RCW, the Superintendent shall maintain the confidentiality of all such information marked confidential or proprietary. If a request is made to view the Contractor's information, the Superintendent will notify the Contractor of the request and the date that such records will be released to the requester unless Contractor obtains a court order enjoining that disclosure. If the Contractor fails to obtain the court order enjoining disclosure, the Superintendent will release the requested information on the date specified.

31. Publicity. The Contractor agrees to submit to the Superintendent all advertising and publicity matters relating to this Contract which in the Superintendent's judgment, Superintendent's name can be implied or is specifically mentioned. The Contractor agrees not to publish or use such advertising and publicity matters without the prior written consent of the Superintendent.

32. Taxes/Fees. The Contractor shall complete registration with the Department of Revenue and promptly shall pay all applicable taxes on its operations and activities pertaining to this Contract. Failure to do so shall constitute breach of this Contract. Unless otherwise agreed, the Superintendent shall pay applicable sales tax imposed by the State of Washington on purchased Goods and/or Services. Contractor's invoices shall separately state (a) taxable and non-taxable charges and (b) sales/use tax due by jurisdiction. In regard to federal excise taxes, Contractor shall include federal excise taxes only if, after thirty (30) calendar days written notice to the Superintendent, the Superintendent has not provided Contractor with a valid exemption certificate from such federal excise taxes.

33. Records Maintenance. The Contractor shall maintain all books, records, documents, data and other evidence relating to this Contract and performance of the services described herein, including but not limited to accounting procedures and practices which sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this Contract. Contractor shall retain such records for a period of six years following the date of final payment. At no additional cost, these records, including materials generated under the Contract, shall be subject at all reasonable times to inspection, review or audit by the Superintendent, personnel duly authorized by the Superintendent, the Office of the State Auditor, and federal and state officials so authorized by law, regulation or agreement.

If any litigation, claim or audit is started before the expiration of the six (6) year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.

34. Right of Inspection. The Contractor shall provide right of access to its facilities to the Superintendent or any of its officers at all reasonable times, in order to monitor and evaluate performance, compliance, and/or quality assurance under this Contract on behalf of the Superintendent. All inspections and evaluations shall be performed in such a manner that will not unduly interfere with the Contractor's business or work hereunder.

35. Severability. The provisions of this Contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the Contract.

36. Site Security. While on Superintendent premises, Contractor, its agents, employees, or subcontractors shall conform in all respects with physical, fire or other security policies or regulations.

37. Subcontracting. Neither the Contractor nor any subcontractor shall enter into subcontracts for any of the work contemplated under this Contract without obtaining prior written approval of the Superintendent. Contractor is responsible to ensure that all terms, conditions, assurances and certifications set forth in this Contract are included in any and all Subcontracts. In no event shall the existence of the subcontract operate to release or reduce liability of the Contractor to the Superintendent for any breach in the performance of the Contractor's duties. This clause does not include contracts of employment between the Contractor and personnel assigned to work under this Contract.

If, at any time during the progress of the work, the Superintendent determines in its sole judgment that any subcontractor is incompetent, the Superintendent shall notify the Contractor, and the Contractor shall take immediate steps to terminate the subcontractor's involvement in the work. The rejection or approval by the Superintendent of any subcontractor or the termination of a subcontractor shall not relieve the Contractor of any of its responsibilities under the Contract, nor be the basis for additional charges to the Superintendent.

38. Subcontractor Payment Reporting. If a subcontractor is used to perform all or part of the services under this Contract under a separate contract with the Contractor, this Contract is subject to compliance tracking using the State's business diversity management system, [Access Equity](#) (B2Gnow). The Contractor and all Subcontractors shall report and confirm receipt of payments made to the Contractor and each Subcontractor through the Access Equity system. User guides and documentation related to Contractor and Subcontractor access to and use of Access Equity are provided by the Office of Minority and Women's Business Enterprises in the [Access Equity Help Center](#). The Superintendent reserves the right to withhold payments from the Contractor for non-compliance with this section. For purposes of this section, Subcontractor means any subcontractor working on the Contract, at any tier and regardless of status as certified woman and/or minority business (WMBE) or Non-WMBE. The Contractor shall:

- a. Register and enter all required Subcontractor information into Access Equity no later than fifteen (15) days after the Superintendent creates the Contract Record.

- b. Complete the required user training (two (2) one- (1-) hour online sessions) no later than twenty (20) days after the Superintendent creates the Contract Record.
- c. Report the amount and date of all payments (i) received from the Superintendent, and (ii) paid to Subcontractors, no later than thirty (30) days, issuance of each payment made by the Superintendent to the Contractor, unless otherwise specified in writing by the Superintendent, except that the Contractor shall mark as "Final" and report the final Subcontractor payments) into Access Equity no later than thirty (30) days after the final payment is due the Subcontractor(s) under the Contract, with all payment information entered no later than sixty (60) days after end of fiscal year.
- d. Monitor contract payments and respond promptly to any requests or instructions from the Superintendent or system-generated messages to check or provide information in Access Equity.
- e. Coordinate with Subcontractors, or Superintendent, when necessary, to resolve promptly any discrepancies between reported and received payments.
- f. Require each Subcontractor to: (i) register in Access Equity and complete the required user training; (ii) verify the amount and date of receipt of each payment from the Contractor or a higher tier Subcontractor, if applicable, through Access Equity; (iii) report payments made to any lower tier Subcontractors, if any, in the same manner as specified herein; (iv) respond promptly to any requests or instructions from the Contractor or system-generated messages to check or provide information in Access Equity; and (v) coordinate with Contractor, or Superintendent when necessary, to resolve promptly any discrepancies between reported and received payments.

39. Taxes. All payments accrued on account of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the Contractor or its staff shall be the sole responsibility of the Contractor.

40. Technology Security Requirements. The security requirements in this document reflect the applicable [requirements of Standard 141.10 of Washington Technology Solutions \(WaTech\)](#) for the state of Washington, which by this reference are incorporated into this agreement.

The Contractor acknowledges it is required to comply with WaTech IT Security Policy 141 and IT Security Standard 141.10, Securing Information Technology Assets. WaTech IT Security Standard 141.10, Securing Information Technology Assets, applies to all Superintendent assets stored as part of a service, application, data, system, portal, module, components or plug-in product(s) that are secured as defined by WaTech's IT Security Policy 141 and IT Security Standard 141.10, Securing Information Technology Assets.

As part of IT Security Standard 141.10, a design review checklist and/or other action may be required. These activities will be managed and coordinated between Superintendent and the

Contractor. Any related costs to performing these activities shall be at the expense of the Contractor. Any such activities and resulting checklist and/or other products must be shared with the Superintendent's Information Technology Services.

41. Termination for Convenience. Except as otherwise provided in this Contract, the Superintendent or Superintendent's Designee may, by ten (10) days written notice, beginning on the second day after the mailing, terminate this Contract in whole or in part. The notice shall specify the date of termination and shall be conclusively deemed to have been delivered to and received by the Contractor as of midnight the second day of mailing in the absence of proof of actual delivery to and receipt by the Contractor. If this Contract is so terminated, the Superintendent shall be liable only for payment required under the terms of the Contract for services rendered or goods delivered prior to the effective date of termination.

42. Termination for Default. In the event the Superintendent determines the Contractor has failed to comply with the conditions of this Contract in a timely manner, the Superintendent has the right to suspend or terminate this Contract. The Superintendent shall notify the Contractor in writing of the need to take corrective action. If corrective action is not taken within thirty (30) days, the Contract may be terminated. The Superintendent reserves the right to suspend all or part of the Contract, withhold further payments, or prohibit the Contractor from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action by the Contractor or a decision by the Superintendent to terminate the Contract. In the event of termination, the Contractor shall be liable for damages as authorized by law including, but not limited to, any cost difference between the original Contract and the replacement or cover Contract and all administrative costs directly related to the replacement Contract, e.g., cost of the competitive bidding, mailing, advertising and staff time. The termination shall be deemed to be a "Termination for Convenience" if it is determined that the Contractor: (1) was not in default; or (2) failure to perform was outside of his or her control, fault or negligence. The rights and remedies of the Superintendent provided in this Contract are not exclusive and are in addition to any other rights and remedies provided by law.

43. Termination Due to Funding Limitations or Contract Renegotiation, Suspension. In the event funding from state, federal, or other sources is withdrawn, reduced, or limited in any way after the effective date of this Contract and prior to normal completion of this Contract, with the notice specified below and without liability for damages:

- a. At Superintendent's discretion, the Superintendent may give written notice of intent to renegotiate the Contract under the revised funding conditions.
- b. At Superintendent's discretion, the Superintendent may give written notice to Contractor to suspend performance when Superintendent determines there is reasonable likelihood that the funding insufficiency may be resolved in a timeframe that would allow Contractor's performance to be resumed.

- (1) During the period of suspension of performance, each party will inform the other of any conditions that may reasonably affect the potential for resumption of performance.
 - (2) When Superintendent determines that the funding insufficiency is resolved, it will give the Contractor written notice to resume performance, and Contractor shall resume performance.
 - (3) Upon the receipt of notice under b. (2), if Contractor is unable to resume performance of this Contract or if the Contractor's proposed resumption date is not acceptable to Superintendent and an acceptable date cannot be negotiated, Superintendent may terminate the Contract by giving written notice to the Contractor. The parties agree that the Contract will be terminated retroactive to the date of the notice of suspension. Superintendent shall be liable only for payment in accordance with the terms of this Contract for services rendered prior to the retroactive date of termination.
- c. Superintendent may immediately terminate this Contract by providing written notice to the Contractor. The termination shall be effective on the date specified in the termination notice. Superintendent shall be liable only for payment in accordance with the terms of this Contract for services rendered prior to the effective date of termination. No penalty shall accrue to Superintendent in the event the termination option in this section is exercised.
- d. For purposes of this section, "written notice" may include email.

44. Termination Procedure. Upon termination of this Contract the Superintendent, in addition to other rights provided in this Contract, may require the Contractor to deliver to the Superintendent any property specifically produced or acquired for the performance of such part of this Contract as has been terminated. The provisions of the "Treatment of Assets" clause shall apply in such property transfer.

The Superintendent shall pay to the Contractor the agreed upon price, if separately stated, for completed work and services accepted by the Superintendent and the amount agreed upon by the Contractor and the Superintendent for (a) completed work and services for which no separate price is stated, (b) partially completed work and services, (c) other property or services which are accepted by the Superintendent, and (d) the protection and preservation of the property, unless the termination is for default, in which case the Superintendent shall determine the extent of the liability. Failure to agree with such determination shall be a dispute within the meaning of the "Disputes" clause for this Contract. The Superintendent may withhold from any amounts due to the Contractor such sum as the Superintendent determines to be necessary to protect the Superintendent against potential loss or liability.

The rights and remedies of the Superintendent provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law under this Contract.

After receipt of a notice of termination, and except as otherwise directed by the Superintendent, the Contractor shall:

- a. Stop work under this Contract on the date and to the extent specified, in the notice.
- b. Place no further orders or subcontractors for materials, services or facilities except as may be necessary for completion of such portion of the work under the Contract that is not terminated;
- c. Assign to the Superintendent, in the manner, at the times, and to the extent directed by the Superintendent, all rights, title, and interest of the Contractor under the orders and subcontracts in which case the Superintendent has the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts;
- d. Settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with the approval or ratification of the Superintendent to the extent the Superintendent may require, which approval or ratification shall be final for all the purposes of this clause;
- e. Transfer title to the Superintendent and deliver, in the manner, at the times and to the extent as directed by the Superintendent, any property which, if the Contract had been completed, would have been required to be furnished to the Superintendent;
- f. Complete performance of such part of the work not terminated by the Superintendent;
and
- g. Take such action as may be necessary, or as the Superintendent may direct, for the protection and preservation of the property related to this Contract which, in is in the possession of the Contractor and in which the Superintendent has or may acquire an interest.

45. Treatment of Assets. Except as otherwise provided for in the Contract, the ownership and title to all real property and all personal property purchased by the Contractor in the course of performing this Contract with moneys paid by the Superintendent shall vest in the Superintendent, except for supplies consumed in performing this Contract. The Contractor shall (1) maintain a current inventory of all the real and personal property; (2) label all the property "State of Washington, Superintendent of Public Instruction"; and, (3) surrender property and title to the Superintendent without charge prior to settlement upon completion, termination or cancellation of this Contract.

Any property of the Superintendent furnished to the Contractor shall, unless otherwise provided herein, or approved by the Superintendent, be used only for the performance of the Contract.

The Contractor shall be responsible for any loss or damage to property of the Superintendent which results from the negligence of the Contractor which results from the failure on the part of the Contractor to maintain and administer that property in accordance with sound management practices.

If any property is lost, destroyed, or damaged, the Contractor shall notify the Superintendent and take all reasonable steps to protect the property from further damage.

All reference to the Contractor under this clause shall include Contractor's employees, agents and subcontractors.

46. Waiver. A failure by either party to exercise its rights under this Agreement shall not preclude that party from subsequent exercise of such rights and shall not constitute a waiver of any other rights under this agreement. Waiver of any default or breach shall not be deemed to be a waiver of any subsequent default or breach. Any waiver shall not be construed to be a modification of the terms of this Agreement unless stated to be such in writing and signed by personnel authorized to bind each of the parties.

EXHIBIT E: DATASHARE TERMS AND CONDITIONS

**AGREEMENT BETWEEN
PARTNER AGENCY NAME
AND
THE OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION
TO AUTHORIZE THE RELEASE AND USE OF EDUCATOR DATA**

In consideration of the promises and conditions contained herein, the Office of Superintendent of Public Instruction ("OSPI") and PARTNER AGENCY NAME ("XYZ") do hereby mutually agree as follows.

1. PURPOSE

XYZ requested information related to DATA DOMAIN information that OSPI maintains. The information requested includes, among other things, demographic information. The information was requested to allow XYZ to initiate research to better understand the RESEARCH INQUIRIES OR GOALS. XYZ is also legislatively charged with CONTENTS WHICH IS ASSIGNED BY LEGISLATURE (IF ANY). The purpose of this Agreement is to authorize the release of DATA DOMAIN information maintained by OSPI to XYZ.

2. RECORDS CONFIDENTIALITY AUTHORITY

OSPI has agreed to share data described in this Agreement or Attachments with XYZ that may be covered by the Social Security Act 42 USC section 405 et seq. and the Public Records Act, chapter 42.56 RCW.

3. DUTIES OF OSPI

OSPI agrees to disclose to XYZ the information solely for the purpose, scope, and duration described therein.

OSPI will not disclose Category 3 or 4 data received from XYZ to any other party, except those employees of OSPI and OSPI's subcontractors (collectively, "OSPI Authorized Users") that are directly involved and have a legitimate interest or a "need to know" in the performance of the research according to the terms of this Agreement.

OSPI certifies that it has the capacity to restrict access to the data received from XYZ solely to OSPI Authorized Users and to ensure that the data is accessed only for the purpose, scope, and duration described in this agreement. OSPI shall comply with Office of the Chief Information Officer (OCIO), Washington State Standard No. 141.10: Securing Information Technology Assets. OSPI agrees to notify XYZ as soon as practicable if OSPI learns of any security breach to the server containing the data or of any disclosure of data to anyone other than the OSPI Authorized Users or OSPI officials authorized to receive confidential data.

OSPI agrees to destroy or return to XYZ all data within forty-five (45) days after it is no longer needed for the purpose described in Section 1, upon XYZ's request, or upon termination of this Agreement, whichever occurs first, and unless agreed otherwise in writing. OSPI must provide written verification of the data destruction (signed copy of Exhibit C) to XYZ within forty-five (45) days after the data is destroyed.

4. DUTIES OF XYZ

XYZ will not disclose the information to any other party, except those employees of XYZ and XYZ's subcontractors (collectively, "Authorized Users") that are directly involved and have a legitimate interest or a "need to know" in the performance of the research according to the terms of this Agreement.

The XYZ must require all Authorized Users to comply with applicable state and federal laws, including without limitation, the Washington State Public Records Act, Chapter 42.56 RCW. XYZ must require each Authorized User to execute OSPI's Non-Disclosure Statement, Exhibit B. Alternatively, XYZ may require each Authorized User to execute a confidentiality agreement that must contain, at a minimum, the terms and conditions of this Agreement. Executed copies of XYZ's confidentiality agreement or OSPI's Non-Disclosure Statement(s), as appropriate, shall be attached to this Agreement as Exhibit B.

XYZ certifies that it has the capacity to restrict access to the information solely to Authorized Users and to ensure that the data is accessed only for the purpose, scope, and duration described in this agreement. XYZ shall comply with Office of the Chief Information Officer (OCIO), Washington State Standard No. 141.10: Securing Information Technology Assets. XYZ agrees to notify OSPI as soon as practicable if XYZ learns of any security breach to the server containing the data or of any disclosure of data to anyone other than the Authorized Users or OSPI officials authorized to receive confidential data. XYZ must cooperate and take all reasonable means prescribed by OSPI to secure any breaches as soon as practicable.

XYZ agrees to destroy or return to OSPI all data within forty-five (45) days after it is no longer needed for the purpose described in Section 1, upon OSPI's request, or upon termination of this Agreement, whichever occurs first, and unless agreed otherwise in writing. XYZ must provide written verification of the data destruction (signed copy of Exhibit C) to OSPI within forty-five (45) days after the data is destroyed.

XYZ agrees to permit OSPI, at OSPI's cost and upon written reasonable request, to inspect, review, or audit XYZ to confirm that the XYZ is complying with this Agreement, including, without limitation, the data security policies and procedures according to the OCIO standards, and the methods of data destruction described in Exhibit C.

XYZ will collect and use the data provided under this Agreement only for the purposes, scope, and duration identified in Section 1. Contractor is prohibited from charging OSPI to get access to contract data. XYZ agrees to provide a copy at the request of OSPI of any aggregate products or reports, published, or otherwise made available.

If XYZ becomes legally compelled to disclose any data (whether by judicial or administrative order, applicable law, rule or regulation, or otherwise), the XYZ must use all reasonable efforts to provide OSPI with prior notice before disclosure so that OSPI may seek a protective order or other appropriate remedy to prevent the disclosure or to ensure OSPI's compliance with the confidentiality requirements of federal or state law. If a protective order or other remedy is not obtained prior to the deadline by which any legally compelled disclosure is required, XYZ will disclose only that portion of the de-identified data that XYZ is compelled to disclose under law.

5. TECHNOLOGY SECURITY REQUIREMENTS

The security requirements in this Agreement reflect the applicable requirements of the following standards from the Office of the Chief Information Officer (OCIO) for the State of Washington, which by this reference are incorporated into this agreement.

141.10 Parts Rescinded: <https://watech.wa.gov/policies/securing-information-technology-assets-standards-parts-rescinded>

SEC-11-01-S Risk Assessment Standard: <https://watech.wa.gov/policies/risk-assessment-standard>

SEC-02 Security Assessment and Authorization Policy: <https://watech.wa.gov/policies/security-assessment-and-authorization-policy>

SEC-08-01-S Data Classification Standard: <https://watech.wa.gov/policies/data-classification-standard>

SEC-08-02-S Encryption Standard: <https://watech.wa.gov/policies/encryption-standard>

XYZ acknowledges it is required to comply with the above standards which applies to all OSPI assets stored as part of a service, application, data, system, portal, module, components or plug-in product(s) that are secured as defined by the WaTech IT Security Policy 141 and IT Security Standard 141.10, Securing Information Technology Assets.

As part of above standards, a design review checklist and/or other action may be required. These activities will be managed and coordinated between OSPI and XYZ. Any related costs to performing these activities shall be at the expense of XYZ. Any such activities and resulting checklist and/or other products must be prepared for state audit requirements. Should a need arise, OSPI may ask to review policies related to the infrastructure that supports the storage and transmission of data.

With exceptions of any areas identified and agreed upon by OSPI who may seek a waiver of any identified misalignments.

6. PUBLICITY

OSPI is not required to agree with or endorse the conclusions or results of the research described in Section 1. XYZ agrees to submit to OSPI all advertising and publicity matters relating to this Agreement which in OSPI's judgment, OSPI's name can be implied or is specifically mentioned. XYZ agrees not to publish or use such advertising or publicity without the prior written consent of

OSPI. Notwithstanding the foregoing, XYZ may make known in a public fashion the existence of the Agreement without prior consent of OSPI.

7. TRANSFER PROTOCOL

OSPI and the XYZ agree to work cooperatively to determine the proper medium and method for the transfer of the data between each other. XYZ will confirm the transfer of confidential data and notify OSPI as soon as practicable of any discrepancies between the actual data transferred and the data described in this Agreement. The same protocol will apply to any transfer of data from XYZ to OSPI. Data transfers will be consistent with the data category's transfer requirements.

8. DATA STORAGE ON PORTABLE DEVICES OR MEDIA PROHIBITED

XYZ, ITS EMPLOYEES, AND AUTHORIZED USERS SHALL NOT STORE ANY DATA ACCESSED THROUGH THIS AGREEMENT ON PORTABLE DEVICES OR MEDIA UNLESS SPECIFICALLY AUTHORIZED WITHIN THIS AGREEMENT.

9. ALTERATIONS AND AMENDMENTS

Terms and conditions of this Agreement, including the Exhibits thereto, may only be amended by mutual written consent of both OSPI and XYZ. XYZ will not assign its respective rights or obligations under this Agreement without prior written consent of OSPI. The rights and obligations of each party under this Agreement shall inure to the benefit of and shall be binding upon that party and its respective successors and assigns.

10. GOVERNING LAW

This Agreement shall be construed and interpreted in accordance with the laws of the State of Washington and the venue of any action brought hereunder shall be in Superior Court for Thurston County.

11. PUBLIC RECORDS

In the event that XYZ receives a public records request or subpoena to produce documents identified in this agreement, XYZ shall provide notice to and opportunity to OSPI for 4 business days so that OSPI may seek a protective order or other appropriate remedy to prevent the disclosure or to ensure OSPI's compliance with the confidentiality requirements of federal or state law. If OSPI does not obtain a protective order or other remedy prohibiting the disclosure within the time period allowed, XYZ will disclose only that portion of the requested data that XYZ is compelled to disclose under law.

12. LIMITATION OF AUTHORITY

Only OSPI shall have the express, implied, or apparent authority to waive any clause or condition of this contract. Furthermore, any waiver or any clause or condition of this contract is not effective or binding unless made in writing and signed by OSPI.

13. SEVERABILITY

The provisions of this contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the contract.

14. AUTHORIZED USERS

The individuals who are the designated Authorized Users for XYZ with respect to this Agreement are listed with their contact information in Exhibit D – Authorized Users for XYZ.

15. INDEMNIFICATION

Each party shall be responsible for the negligence of its own employees or agents in the performance of this Agreement.

16. TERMINATION FOR CONVENIENCE

Except as otherwise provided in this Agreement, either party may, by five (5) days written notice, beginning on the second day after the mailing, terminate this contract in whole or in part. The notice must specify the date of termination.

17. TERMINATION FOR DEFAULT

Either party may terminate this Agreement in the event the other party materially breaches any term, provision, warranty, or representation.

XYZ acknowledges that the breach of this Agreement or its part may result in irreparable and continuing damage to OSPI for which money damages may not provide adequate relief. In the event of a breach or threatened breach of this Agreement by XYZ, OSPI, in addition to any other rights and remedies available to OSPI under this Agreement, at law, or in equity, may be entitled to preliminary and permanent injunctions to enjoin and restrain the breach or threatened breach.

In the event of a breach by XYZ, the rights and remedies of OSPI provided in this Agreement are not exclusive and are in addition to any other rights and remedies provided by law.

18. NOTICE OF CLAIM OR SUIT

In the event of any suit or claim against XYZ or its representatives related to the subject of this agreement or discharge of obligations under this agreement, XYZ or its representatives shall give OSPI immediate notice of claim or suit. In the event that OSPI is named or included in the claim or suit against XYZ, XYZ shall provide all assistance and cooperation required by OSPI. OSPI shall give XYZ and its representatives written notice of any claim or suit against OSPI related to the subject of this agreement or discharge of obligations under this agreement, and XYZ and its representatives shall have the full right and obligation to conduct XYZ or its representatives' own defense thereof. Nothing contained herein shall be deemed to accord to XYZ or its representatives, through their attorney(s), the right to represent OSPI or the State of Washington in any legal matter.

19. ENTIRE CONTRACT

This contract contains all the terms and conditions agreed upon by the parties. No other understandings, oral or otherwise, regarding the subject matter of this Agreement shall be deemed to exist or to bind any of the parties hereto.

20. EFFECTIVE DATE AND TERM

OSPI will not disclose the data prior to the occurrence of each of the following conditions:

This Agreement must be executed by a representative of OSPI and XYZ;

XYZ must provide a completed copy of Exhibit D – Authorized Users to OSPI’s Contract Manager; and

XYZ must provide executed confidentiality agreements (attached as Exhibit B - Statement of Confidentiality and Non-Disclosure) for all Authorized Users to OSPI’s Contract Manager.

The term of this Agreement is as follows, subject to the three prior conditions to OSPI’s commencement of performance set forth immediately above and except as otherwise provided in this Agreement:

DD/MM/YYYY, or the date of execution, whichever is later, through DD/MM/YYYY.

21. CONTRACT MANAGEMENT

The following Contract Manager for each of the parties shall be the contact person for all communications regarding the performance of this Agreement.

Contract Manager for OSPI	Contract Managers for XYZ
NAME Title Old Capitol Building, P.O. Box 47200 Olympia, WA 98504-7200 Phone: (360) 725-XXXX Fax: (360) 725-XXXX Email: XXXX@k12.wa.us	NAME TITLE/ROLE ADDRESS Phone: Email:

22. INCORPORATION OF EXHIBITS AND ORDER OF PRECEDENCE

Each of the attachments listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this Agreement, the inconsistency shall be resolved by giving precedence in the following order:

- Applicable Federal and state of Washington statutes and regulations
- The terms of this Agreement
- Exhibit A – Data Request Form
- Exhibit B – Statement of Confidentiality and Non-Disclosure
- Exhibit C – XYZ Certification of Data Destruction

- Exhibit D – Authorized Users for XYZ
- Exhibit E – OSPI Certificate of Data Destruction
- Any other provision, term or material incorporated herein by reference or otherwise incorporated

APPROVAL

This Agreement shall be subject to the written approval of OSPI's authorized representative and shall not be binding until so approved. The Agreement may be altered, amended, or waived only by a written amendment executed by both parties.

We the undersigned agree to the terms of the foregoing Agreement.

<div></div>		<div></div>	
NAME		NAME	
Contracts Administrator		TITLE	
Office of Superintendent of Public Instruction		PARTNER AGENCY NAME	
<div></div>		<div></div>	
Date		Date	

EXHIBIT A

Data Request Form

XYZ requests the following data from OSPI. This request is for the following data as of date of MM/DD/YYYY to current. The data in this file is Category __.

DATA SET	COLUMN NAME	COLUMN DESCRIPTION	DATA TYPE	MAX LGTH	PRECISION

SAMPLE
Do Not Complete

EXHIBIT B

OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION STATEMENT OF CONFIDENTIALITY AND NON-DISCLOSURE

I acknowledge that I am an "Authorized User" under this Data-Sharing Agreement and I understand that I will have access to sensitive information provided by OSPI. I understand that the information may be used solely for the purposes of work outlined in Section 1.

- I have been informed and understand that all information related to this Agreement is confidential and may not be disclosed to unauthorized persons. I agree not to divulge, transfer, sell, or otherwise make known to unauthorized persons any information contained in this system.
- I also understand that I am not to access or use this information for my own personal information but only to the extent necessary and for the purpose of performing my assigned duties as a XYZ related to this Agreement. I understand that if I participate in any unauthorized disclosure of confidential information I may be subject to applicable disciplinary, civil, and criminal proceedings and/or penalties.
- I will comply with applicable state and federal privacy laws, including the Washington State Public Records Act Chapter 42.56 RCW.

Signature: _____

Date: _____

Printed Name: _____

Title: _____

XYZ hereby assures the Office of Superintendent of Public Instruction (OSPI) that: (1) the above named person has been informed of the obligations and limitations respecting the non-disclosure of information established by the Data-Sharing Agreement between XYZ and OSPI, (2) no information will be disclosed to any person or entity not expressly authorized by or pursuant to the Agreement to receive such information, (3) XYZ shall adequately safeguard all such confidential information from disclosure or access to by unauthorized persons, (4) all confidential information provided by or through OSPI will be returned to OSPI or destroyed prior to the expiration of the Agreement, or immediately upon termination of the Agreement by either party; and (5) XYZ has adequate supervision and control over its employees, officers, contractors, and subcontractors to ensure their compliance with these Assurances.

Signature: _____

Date: _____

Printed Name: _____

Title: _____

EXHIBIT C

XYZ CERTIFICATION OF DATA DESTRUCTION

This form must be signed by XYZ and returned to OSPI within 15 days of the date of disposal.

Acceptable destruction methods for various types of media include:

- 1) If information has been contained on optical discs (e.g. CDs, DVDs, Blu-ray), the data recipient shall either destroy by incinerating the disc(s), shredding the discs, or completely deface the readable surface with a coarse abrasive.
- 2) If information has been stored on magnetic tape(s), the data recipient shall destroy the data by degaussing, incinerating or crosscut shredding.
- 3) If data has been stored on server or workstation data hard drives or similar media, the data recipient shall destroy the data by using a "wipe" utility which will overwrite the data at least three (3) times using either random or single character data, degaussing sufficiently to ensure that the data cannot be reconstructed, or physically destroying disk(s).
- 4) For paper documents containing information, a contract with a recycling firm to recycle confidential documents is acceptable, provided the contract ensures that the confidentiality of the data will be protected. Such documents may also be destroyed by on-site shredding, pulping, or incineration.

- All copies of any data sets related to Data-Sharing Agreement #_____ have been wiped from data storage systems.
- All materials and non-wiped computer media containing any data sets related to Data-Sharing Agreement #_____ have been destroyed.
- All copies of any data sets related to Data-Sharing Agreement #_____ that have not been disposed of in a manner described above, have been returned to the OSPI's Contract Manager listed in this Contract.

Date of Disposition: _____

XYZ hereby certifies, by signature below, that the data disposition requirements outlined above have been fulfilled.

Signature of XYZ: _____

Date: _____

SAMPLE
Do Not Sign

EXHIBIT D
AUTHORIZED USERS FOR XYZ

The individuals below are authorized to have access to or work directly with data provided in this agreement.

At any point in time during the duration of the data sharing agreement any of the staff listed below are removed from the project written notification must be provided to OSPI immediately.

At any point in time during the duration of the data sharing agreement individuals are to be added as authorized users for research, written notification of the individual(s) to add and a signed original Exhibit B Statement of Confidentiality and Non-Disclosure for each person must be provided to OSPI, prior to providing access to the data.

- (1) NAME, TITLE, PHONE NUMBER, EMAIL ADDRESS
- (2) NAME, TITLE, PHONE NUMBER, EMAIL ADDRESS
- (3) NAME, TITLE, PHONE NUMBER, EMAIL ADDRESS

EXHIBIT E

OSPI CERTIFICATION OF DATA DESTRUCTION

This form must be signed by OSPI and returned to XYZ within 15 days of the date of disposal. Acceptable destruction methods for various types of media include:

- 1) If information has been contained on optical discs (e.g. CDs, DVDs, Blu-ray), the data recipient shall either destroy by incinerating the disc(s), shredding the discs, or completely deface the readable surface with a coarse abrasive.
- 2) If information has been stored on magnetic tape(s), the data recipient shall destroy the data by degaussing, incinerating or crosscut shredding.
- 3) If data has been stored on server or workstation data hard drives or similar media, the data recipient shall destroy the data by using a "wipe" utility which will overwrite the data at least three (3) times using either random or single character data, degaussing sufficiently to ensure that the data cannot be reconstructed, or physically destroying disk(s).
- 4) For paper documents containing information, a contract with a recycling firm to recycle confidential documents is acceptable, provided the contract ensures that the confidentiality of the data will be protected. Such documents may also be destroyed by on-site shredding, pulping, or incineration.

- All copies of any data sets related to Data-Sharing Agreement # have been wiped from data storage systems.
- All materials and non-wiped computer media containing any data sets related to Data-Sharing Agreement # have been destroyed.
- All copies of any data sets related to Data-Sharing Agreement # that have not been disposed of in a manner described above, have been returned to the OSPI's Contract Manager listed in this Contract.

Date of Disposition: _____

OSPI hereby certifies, by signature below, that the data disposition requirements outlined above have been fulfilled.

Signature of OSPI: _____

Date: _____

EXHIBIT F: CONTRACT ISSUES LIST

This Exhibit is optional. Bidders need only to complete and submit this Exhibit ***IF*** bidder has issues, concerns, exceptions, or objections to any of the terms or conditions contained in the Sample Contract and/or any terms and conditions stated within the procurement. In such case, bidder must use this *Bidder's Contract Issues List* to identify the same as set forth below.

The *Contract Issues List* is designed to frame contract discussions, if any, between OSPI and bidders regarding the Contract terms and conditions. In completing the *Contract Issues List*, bidders **must**:

- A. Identify the specific Contract section/subsection that creates a business issue, concern, exception, or objection;
- B. Describe, in business terms, the issue, concern, exception, or objection pertaining to the Contract section/subsection;
- C. Propose, in business terms, a solution that is reasonable in light of the Competitive Solicitation and the procurement solution being sought by OSPI; and
- D. Provide bidder's reason or rationale supporting bidder's proposed solution, including how the proposed solution is commercially reasonable for a public contract, benefits both the bidder and the OSPI and equitably allocates contractual risk and return.

Please be advised: The Contract(s) to be awarded is the result of a Competitive Solicitation developed pursuant to Washington's Procurement Code for Goods/Services that is designed to meet governmental needs for eligible purchasers. OSPI endeavors to develop commercially reasonable Contracts that incentivize performance and equitably allocate risk and return based on stakeholder input from eligible purchasers, vendors, procurement professionals, and others. Accordingly:

- Contract revisions, if any, may NOT be bidder-specific, but must apply to all bidders.
- Redlined Documents Will Not Be Reviewed. Do not provide a redlined Contract or sections/subsections. Redlined text may result in OSPI making potentially inaccurate assumptions regarding bidder's issue(s). Instead, bidders must follow the instructions set forth above.
- 'Standard' Bidder Contracts Will Not Be Reviewed. Do not provide a copy of bidder's (or a third party's) 'standard' contract or contract section. It will not be reviewed.
- No Substantial Changes. Bidders are cautioned that this is a competitive solicitation for a public contract and **OSPI cannot and will not accept a bid or enter into a**

Contract that substantially changes the material terms and conditions set forth in this Competitive Solicitation and Contract. Bids that are contingent upon OSPI making substantial changes to material terms and conditions set forth in the Competitive Solicitation or Contract likely will be determined to be non-responsive.

OSPI will consider the number and nature of the items on *Contract Issues List* in determining the likelihood of completing a Contract with such bidder

Available as a fillable form on [OSPI's procurement website](#).

Bidder's Contract Issues List				
Bidder Name:				
No.	Contract Section	Issue Description	Bidder's Proposed Solution	Bidder's Rationale for Proposed Solution
1.				
2.				
3.				
4.				
5.				

EXHIBIT G: OSPI AMERICANS WITH DISABILITIES ACT COMPLIANCE: GRAPHICS AND COLORS

Graphics & Colors: OSPI Americans with Disabilities Act (ADA) Compliance

Many people with low vision do not see web pages the same as others. Some see only small portions of a computer display at one time. Others cannot see text or images that are too small. Still, others can only see website content if it appears in specific colors.

For these reasons, many people with low vision use specific color and font settings when they access the Internet.

For example, some people with low vision need to use high-contrast settings, such as bold white or yellow letters on a black background. Others need just the opposite – bold black text on a white or yellow background. And, many must use softer, more subtle color combinations.

Tips for Graphic Creation that is Accessible

- Provide good contrast. Be especially careful with light shades of gray, orange, and yellow.
- Use True Text whenever possible. You can see True Text (TT) next to the font selection in most programs.
- Avoid all caps. All caps can be difficult to read and can be read incorrectly by screen readers.
- Use adequate font size. The size can vary depending on the font chosen, but 10 point is usually the minimum.
- Make sure links are recognizable.
- Differentiate links in the body of the page with underline or bold. Links should clearly tell the user where the link will take them (no "click here" links).

- Don't convey content with color alone. Users often can't distinguish or may override page colors.

Resources for Web Accessibility

- [Color code finder](#). Upload a photo to find the different color codes.
- [Color contrast checker](#). Enter color codes to find out which foreground and background combination is accessible.

Accessible Color Guidance

The colors below are OSPI's main brand colors and associated codes. They are displayed with text and background color in ADA compliance.

OSPI's cream and charcoal colors should be used in designs instead of white and black.

- Charcoal color code: #40403d
- Cream color code: #f7f5eb

Preferred



Optional

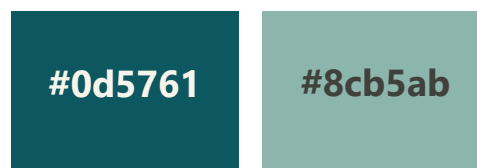


EXHIBIT H: CONSULTANT INTAKE FORM

Available as a fillable form on [OSPI's procurement website](#).

EXHIBIT I: PROPOSAL CHECKLIST

This checklist identifies the components that must be submitted to constitute a complete proposal. Proposals that do not include the components identified below may be rejected as nonresponsive. In addition, a bidder's failure to complete any submittal as instructed may result in the proposal being rejected. Bidders may not provide unsolicited materials. For any supplemental materials expressly required by this procurement in writing, bidders must identify such supplemental materials with the bidder's name.

This checklist does not need to be submitted with your proposal.

Component
<input type="checkbox"/> Letter of Submittal <ul style="list-style-type: none"><input type="checkbox"/> Certifications and Assurances<p>The certification must be signed and submitted by a duly authorized representative for the bidder. Download an editable version from OSPI's website</p><input type="checkbox"/> Qualification Affirmations<p>Bidder must confirm that the bidder meets all minimum qualifications set forth in the Minimum Qualifications section. Download an editable version from OSPI's website</p><input type="checkbox"/> Contract Issues List<p>Bidders need only to complete and submit this Exhibit <i>IF</i> bidder has issues, concerns, exceptions, or objections to any of the terms or conditions contained herein. Download an editable version from OSPI's website</p><input type="checkbox"/> Consultant Intake Form<p>Must be signed and submitted by a duly authorized representative for the bidder. Download an editable version from OSPI's website</p><input type="checkbox"/> Washington State Business License, if applicable (see <i>Consultant Intake Form</i>).<p>Provide a copy of the business license, or the UBI number on the <i>Consultant Intake Form</i>. A bidder without a Washington State Business License may submit a proposal. Contingent upon award, the bidder may be required to obtain a license. For more information about this, visit the Department of Revenue website.</p>
<input type="checkbox"/> Management Proposal <ul style="list-style-type: none"><input type="checkbox"/> Management Proposal<input type="checkbox"/> References

Component
<input type="checkbox"/> Technical Proposal <ul style="list-style-type: none"> <input type="checkbox"/> Technical Approach <input type="checkbox"/> Security Design Review
<input type="checkbox"/> Proposed Business Solution <ul style="list-style-type: none"> <input type="checkbox"/> Project Plan (one per work section included in bid) <input type="checkbox"/> Requirements Review <input type="checkbox"/> Risk Register (one per work section included in bid)
<input type="checkbox"/> Financial Proposal <ul style="list-style-type: none"> <input type="checkbox"/> Financial Proposal <input type="checkbox"/> Data Collection Cost Breakdown (if included in bid) <input type="checkbox"/> Data Calculation Cost Breakdown (if included in bid) <input type="checkbox"/> Data Reporting Cost Breakdown (if included in bid)
<input type="checkbox"/> Technical Integration Plan
<input type="checkbox"/> References

SECTION F: ATTACHMENTS

Available for download on [OSPI's procurement website](#).

ATTACHMENT A: SASQUATCH SYSTEM REQUIREMENTS

ATTACHMENT B: HIGH LEVEL AS-IS WORKFLOWS

ATTACHMENT C: SASQUATCH DEMONSTRATION SCENARIOS

ATTACHMENT D: COST PROPOSAL BREAKDOWN WORKBOOK