

Q1:

Are you looking for someone to create a program for a specific curriculum that already exists" Or are you looking for someone to create a program for the Charities Advisory Council? I'm a little confused as to what you are looking for.

A1:

We have a list of topics from the Charities Advisory Council and we're looking for a vendor to develop a curriculum which includes materials and learning objectives associated with those topics.

Q2:

Your reply helps, but it would help to have a general idea of the topics. If the topics cover subject matter in the leadership and or communication areas, then I'm your guy. If the program needed revolves around Human Resources and or marketing, then someone else would be better suited.

A2:

RFP 15-11 includes "Exhibit C" which is the list of topics developed by the Charities Advisory Council's Education Program Subcommittee. The list is somewhat specific and should be of tremendous assistance.

Q3:

1. Is the Secretary of State's Office looking to make one grant that will subcontract out for the different types of trainings, or in the alternative, will the SOS be interested in making smaller grants to different organizations to do different parts of the RFP?

2. Do you have geographic locations of where the training should be held identified? I see in the RFP that the trainings will be held throughout Washington "according to the distribution of nonprofit corporations and charities throughout the state." I'm wondering if you have information available that specifies what that distribution is, and what the expected deliverable will be with respect to the location of the 24 trainings.

A3:

1. The Secretary of State's intent is to award one grant to one successful vendor. The successful vendor has the option to subcontract out section(s) of the contract. The Project management section of the RFP discusses subcontractors and requires the successful vendor to provide notification of who will be assigned to the contract and what their responsibilities and qualifications will be. If a subcontractor is used, the relationship and funding agreement is between the successful vendor and the subcontractor(s).

2. Our primary expectation is that western Washington and eastern Washington receive equal access to training. We do have information available within our system and we expect to work with the successful vendor on more specific locations.

Q4:

Will the registration system and process be the responsibility of the contractor, or will OSOS handle registration from your website? If the former, will OSOS put a link on your website to direct those who want to register?

A4

Our office is open to either of these processes, but will look to responding vendors to propose their recommendation.

Q5:

Is OSOS data re the distribution of nonprofits throughout the state available prior to the proposal deadline?

A5:

A data download of the registered corporations is available by visiting the corporations' web page at https://www.sos.wa.gov/corps/search_advanced.aspx . The download feature is located at the top, right-hand side of the page. The nonprofit distribution can be pulled from that data.

Q6:

Will OSOS personnel be present at the training sessions, and, if so, what role(s) will they have?

A6:

It's not our intention to have OSOS personnel attend the sessions. We expect the vendors to have or to develop the expertise to conduct these sessions.

Q7:

Are representatives from related agencies (DOR, ESD, etc.) available for presentations and, if so, at what cost?

A7:

We do not know at this time.

Q8:

I represent an Oregon corporation that is interested on responding to the opportunity on the WEBS system - RFP 15-11 and I see that it requires us to have a UBI number.

As an Oregon corporation we do not have that but are licensed to do business essentially anywhere. Is that a firm requirement or will our Oregon and federal identifications be adequate?

A8:

The requirement to be registered with the Secretary of State's Office to do business in the state of Washington and have a current UBI is firm.

As long as the organization has properly registered with the Secretary of State by the RFP deadline of August 26, 2015, there won't be an issue. A Foreign (non-Washington) Profit Corporation can file online at [Profit Corporations, Online and Paper Registrations](#) .

Q9:

Will the contractor have access to the mailing list that was used in the past to let people know of the trainings?

A9:

The successful vendor will certainly have access to the information maintained by the Secretary of State's Office.

Q10:

Will the vendor be required to use public facilities as the OSOS Education Program has had to do in the past?

A10: No, the successful vendor does not have to use public facilities for trainings.

Q11:

1. Our company develops customized online training modules and curriculums. The deliverable given in the RFP describes the training be delivered through training events (24 in the first year). Will OSOS consider an alternative delivery method? Specifically, the delivery of the training through online training modules delivered via the internet rather than location based "training events"?

2. The RFP states "*Consultants must have knowledge of Washington state laws and regulations regarding the operation of nonprofit corporations and charities, including internal operations and external compliance requirements*". Our company does not have expertise in this area. However, we do have extensive expertise in curriculum and course development and do have extensive experience in eliciting information from Subject Matter Experts. Will the selected vendor have access to Subject Matter experts at OSOS (or the Charities Advisory Council or other departments) during the contract period to access the expertise required to develop the curriculum and training courses?

3. If a proposing Vendor does not currently have a Washington UBI number, is it sufficient to just state in the Letter of Submittal that the "UBI number has been applied for"?

A11:

An online training module delivered via the Internet **only** does not meet requirements of the RFP. In addition, consultants must have knowledge of Washington State laws and regulations regarding nonprofit corporations and charities.

Q12:

1. What resources will be available from the Corporations and Charities Division to provide or assist with event planning and logistics? What are the expectations of the contractor to provide event planning services and coordinate logistics?

2. Section 3.3, B.1.a. indicates the consultant should have experience in "Use of media, including but not limited to, print, web pages, and web video." Would you please clarify how this requirement is connected to the deliverables?

3. Is there a particular pedagogical approach that the Advisory Council or others envision for the program? If so, please specify the expectations or vision.

4. How did the Charities Advisory Council develop the list of training topics? What steps have been taken to vet these topics by region or by county to ensure the most pressing local needs are met?

5. The RFP discusses anticipated outcomes for the contractor-designed and implemented program. What are the *current* outcomes and impacts of the Charities Education Program, and how are they being measured? Are there evaluation reports available to the public?

6. The RFP refers to an annual survey of nonprofit corporations and charities. What is the purpose of the annual survey? Are the results of the most recent survey(s) available?

7. Will it be acceptable to charge participants a registration fee or tuition?

8. Does the Corporations and Charities Division have the capacity to issue CEUs for participants in professions that require professional development credit?

9. The RFP references the current fiscal year, and the 16-17 fiscal year. What are the long term expectations of the Charities Education Program?

10. Please clarify the submission requirements. Section 2.3 on page three indicates we should submit electronic files, however section three on the top of page six seems to suggest you may be expecting hard-copy proposals. Also, is there a page limit for the proposal?

A12:

1. Our expectation is that the successful vendor will handle the event planning and logistics. Conducting the education events, including handling the event planning and logistics, are key aspects of success in this procurement.
2. The deliverables include materials to be used in trainings, whether in person or online. These materials will be used jointly by the vendor and our office web site.
3. There is no particular pedagogical approach envisioned for the program. We are focused on building solid learning objectives and tools for measuring success.
4. The Charities Advisory Council developed the list of topics from their own different backgrounds and regions. These topics have not been vetted by region or county, but are consistent with the topics that the Secretary received in round table meetings throughout the state in 2006.
5. The current program currently has one reported outcome, to reduce the number of administratively dissolved nonprofit corporations. While there is a quarterly report on administrative dissolutions of nonprofits, it does not appear to correlate with the education program at this time. The quarterly results of this metric are available upon request and will be posted with these answers on August 12. In our decision package to the legislature for the program expansion, we also stated that we would track and report the number of training events provided per quarter. We can also provide historic data of our baseline history of number of educational events. We expect the number of educational offerings to increase and the number of administrative dissolutions of nonprofit corporations to decrease.
6. The survey is one of the deliverables of this procurement. We do not currently conduct such a survey but would use an annual survey to obtain feedback from the nonprofit community on the education program.
7. We currently charge \$10 per participant. We will consider proposals to raise the fee, either universally or on a course-by-course basis, as part of a response to this RFP. Charging a fee or changing the fee is not a requirement of the RFP.
8. We do not. If your proposal involves issuing such credits, please include the steps you plan to take to ensure compliance with the various professional organizations/regulations. This is not a required element of this RFP.
9. The program is in statute and expected to be around for an indefinite time. However, funding is determined every two years.
10. There is no page limit and we will accept either electronic or paper submissions.

**SEE PROGRAM METRICS BELOW*

Corporations and Charities Division Metrics

Metric 001063 - Average number of days to process Charities filing from receipt

Measures timeliness in filing charities documents

Source: Corporations Charities Queue Statistics newest_20080818.xlsx on M:>>Stats directory (Sharon updates)

Lower numbers are better			prev sub	New	
Biennium	Qtr	Actual	Target	Target	Comments
2015-17	Q8		5	5	
2015-17	Q7		5	7	heavy quarter
2015-17	Q6		5	8	later impl new system, heavy quarter
2015-17	Q5		5	9	changed, later implemtn on new system
2015-17	Q4		7	9	changed, later implemtn on new system
2015-17	Q3		9	9	
2015-17	Q2		10	10	
2015-17	Q1		10	10	
2013-15	Q8	2.9	10		
2013-15	Q7	12.5	14		
2013-15	Q6	11.6	10		
2013-15	Q5	5.8	10		
2013-15	Q4	9.5	12		
2013-15	Q3	9.4	16		
2013-15	Q2	11.2	12		
2013-15	Q1	4.6	12		

Q13:

1. What is the OSOS's vision for using some online meeting technology to make training more accessible and raise attendance?
2. Based on what we've read, it appears that current workshop presenters are volunteers and have been well received. Is that is correct, will they be available to participate in the coming year either as volunteers or as paid presenters in the contract? If they will be available, either as volunteer or paid presenters, is there a fee structure and travel expense guidelines available for our use in the budget projection?

A13:

1. Our office is open to online technology to meet certain training needs, but the online training is one portion of the overall training. We will look to responding vendors to propose their recommendations.
2. Our office is unaware of the previous volunteer presenters' schedule. The successful vendor has the option to subcontract out section(s) of the contract. The Project management section of the RFP discusses subcontractors and requires the successful vendor to provide notification of who will be assigned to the contract and what their responsibilities and qualifications will be. If a subcontractor is used, the relationship and funding agreement is between the successful vendor and the subcontractor(s).

Q14:

1. Will volunteers that have been providing the trainings chat about their experience to aid curriculum and training material development?
2. What, if any, materials are currently used by the volunteers?
3. Are you looking for a lawyer to do the work?
4. What state resources are available?
5. Is there a timeline preference for when the curriculum development will be complete?
6. The RFP mentions trainings in east and west Washington, do you have expectations about more geographic diversity of locations, such as north or south, central?
7. Is the consultant responsible for advertising the trainings or will OSOS do that?
8. Will the curriculum/materials be branded? If so, will they use OSOS branding or will you want new design for this initiative?
9. Will the consultant work with OSOS to develop the training surveys or will OSOS develop the survey itself?
10. Does the maximum fee in the RFP include travel, hotel, per diem costs for the trainings around the state?
11. Will OSOS handle printing costs for training materials or is the consultant responsible?
12. Does OSOS have a contract with any firm to do similar work on this or other initiatives currently?
13. If a response makes the finals selection and scores higher in compensation, but lower in technical and management, will it have priority over other finalists?
Alternate: Is the cost proposal weighted more than the technical proposal in final selection?

A14:

1. That would not be up to us to say. The volunteers would have to be consulted.
2. There were several volunteers and their expertise varied. The type of material depended on the topic, but usually included PowerPoints, informational handouts, or brochures.
3. Not necessarily. This is not a required element of the RFP.
4. Other than payment for services under the RFP, and consultation with OSOS staff, none.
5. No later than the end of the contract, which is June 30, 2016.
6. Except for Eastern and Western Washington, nothing more specific is stated in the RFP however, more geographic diversity is favorable. Our office is open vendor's recommendations.
7. The consultant is responsible for advertising the trainings but the OSOS will assist with the use of the Education Program website.
8. The curriculum, materials and all aspects of the project will carry the current Secretary of State brand, but may include branding from the consultant as well.
9. Yes, the consultant will work with the Secretary of State to develop the training surveys.
10. Yes.
11. The successful vendor will be responsible.
12. No.
13. The cost proposal weight matches that of the technical proposal, per section 4.2 of the RFP.

Q15:

Do I need to obtain a general contractor number?

A15:

The RFP doesn't require a general contractor number. The RFP does require the vendor to be registered to do business in Washington and have a UBI number.