

Pension Administration Modernization

Request for Proposals No. 22-07

November 2022



Table of Contents

Tables	3
1. Introduction	4
1.1 Purpose	4
1.2 Background.....	4
1.3 Scope of Work.....	6
1.4 Americans with Disabilities Act (ADA).....	7
1.5 Definitions	7
1.6 Period of Performance	7
1.7 Minimum Solution Qualifications.....	8
1.8 Minimum Bidder Qualifications	8
1.9 References.....	9
2. Procurement process	9
2.1 DRS RFP Coordinator	9
2.2 Procurement Schedule	10
2.3 Pre-Proposal Process	11
2.4 Proposal Requirements	13
3. Evaluation Process	18
3.1 Award Based on Multiple Factors Including Best Value.....	18
3.2 Evaluation Steps.....	19
3.3 Administrative Screening.....	19
3.4 Written Evaluation	19
3.5 On-Site Evaluation.....	21
3.6 Final Selection.....	23
3.7 Debriefing Conference.....	24
3.8 Protest Procedure	24
3.9 Procurement Evaluation for Executive Order 18-03 – Supporting Workers’ Rights	25
3.10 Procurement Evaluation for Small and Diverse Businesses	26
3.11 WEBS Registration.....	26
3.12 Single Proposal.....	26
3.13 Clarification of Proposal	26
4. Administrative Requirements	26
4.1 Acceptance Period.....	26
4.2 Bidder’s Understanding of the RFP.....	26
4.3 Commitment of Funds.....	27
4.4 Contract Award	27

4.5	Contractual Requirements	27
4.6	Cost to Propose	27
4.7	Conflict of Interest	27
4.8	Prime Contractor and Subcontractors	27
4.9	Most Favorable Terms	28
4.10	No Obligation to Contract	28
4.11	Publicity	28
4.12	Records Retention	28
4.13	Compliance with Agency Policies	29
4.14	Withdrawal of Proposals	29
4.15	World Trade Organization (WTO) Government Procurement Agreement (GPA)	29
4.16	COVID-19 Contractor Verification Plan	29

5. Exhibits **29**

Tables

Table 1 – DRS RFP Coordinator Contact Information	10
Table 2 – Schedule of Procurement Activities	10
Table 3 – RFP Submission Checklist	14
Table 4 – Written Evaluation Weighting Criteria	20
Table 5 – On-Site Evaluation Weighting Criteria	23

1. Introduction

1.1 Purpose

The Washington State Department of Retirement Systems (DRS) is issuing this Request for Proposals (RFP) to procure a vendor that will provide a technology solution, implement, and maintain a modified off-the-shelf (MOTS) pension administration solution (PAS, or the “Solution”). DRS is seeking a partner that is experienced, collaborative and committed to a successful partnership.

1.2 Background

DRS administers Washington state’s eight public sector retirement systems with 15 separate plans that have a combined total asset value of approximately \$172 billion as of June 30, 2021. The retirement systems and plans are as follows:

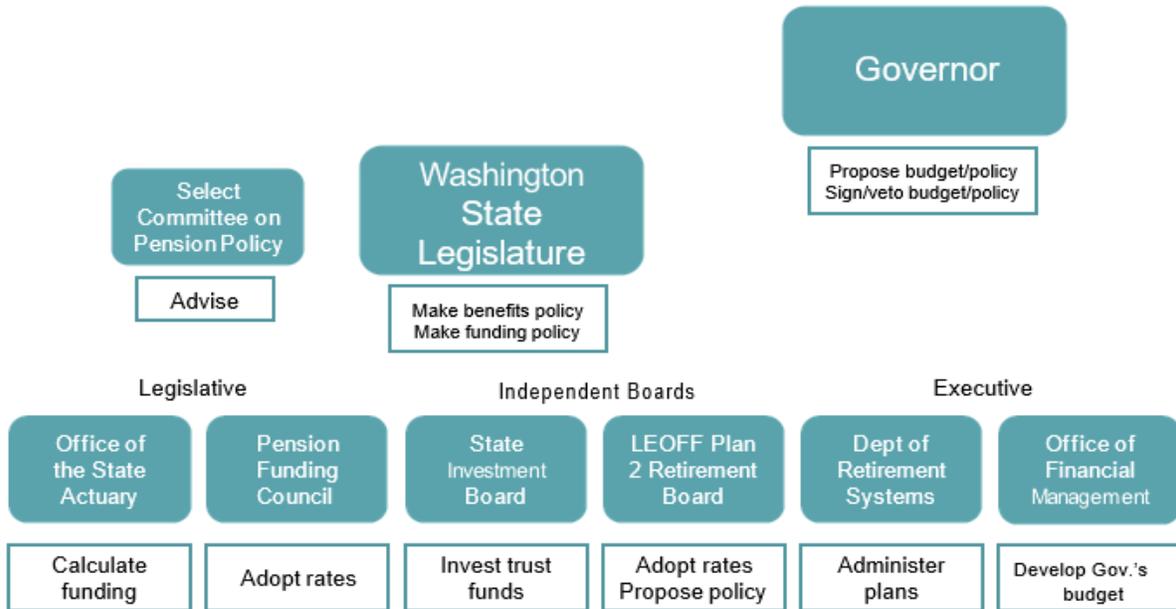
- Judges’ Retirement Fund
- Judicial Retirement System
- Law Enforcement Officers’ and Fire Fighters’ (LEOFF) Retirement System Plan 1 and Plan 2
- Public Employees’ Retirement System Plan 1, Plan 2 and Plan 3
- Public Safety Employees’ Retirement System Plan 2
- School Employees’ Retirement System Plan 2 and Plan 3
- Teachers’ Retirement System Plan 1, Plan 2 and Plan 3
- Washington State Patrol Retirement System Plan 1 and Plan 2

This combination of plans was rated the fourth most complex public pension system, relative to 45 other public pension systems across North America, in a 2021 benchmarking analysis.

DRS also administers the Deferred Compensation Program (DCP), a 457(b) plan for State and local government employees, and the Judicial Retirement Account, a defined contribution 401(a) plan.

More information about DRS is available at <https://www.drs.wa.gov/about/>. More information about pensions in Washington is available at <https://www.drs.wa.gov/pensions/>.

DRS Governance Structure



1.2.1 CORE Program Overview

DRS’ Creating an Outstanding Retirement Experience (CORE) Program is a multi-year, multi-project effort to support technology enhancements and business process redesign. The program was established in 2018 and began by migrating legacy systems off the mainframe.

In the 2021-23 Biennium, the CORE Program is focused on planning and procuring for the Pension Administration Modernization (PAM) project (or the “Project”). Implementation for the PAM Project will occur July 2023 to June 2027.

DRS’ overarching business goals for CORE are to:

- Modernize business processes to support an excellent customer experience resulting in **Elated Customers**.
- Enhance DRS team member experience to support customer satisfaction via **Engaged Team Members**.
- Reduce technology and cybersecurity risks as **Vigilant Resource Stewards**.

1.2.2 CORE: PAM Project Overview

The CORE: PAM project will replace several mission-critical DRS applications that are almost 30 years old. These systems maintain information for approximately 850,000 current and former public employees and are DRS’ tools for calculating and distributing \$6.4 billion in payments each year.

Through the Project, DRS will strive for:

- **Elated Customers:** Serve our customers more quickly and efficiently resulting in an improved customer experience
- **Engaged Team Members:** Support team members in doing efficient and effective work by providing modernized business process and tools
- **Vigilant Resource Steward:** Increase operating reliability and flexibility with modernized technology and a dependable vendor partner.

1.2.3 Project Governance

Please refer to **Exhibit C1 – Governance, Accountability and Oversight Plan** for information and expectations on Project governance.

1.3 Scope of Work

1.3.1 In Scope

DRS expects this Project to provide modernized business process and technology for the following DRS CORE operating processes and their associated sub-processes:

- Paying benefits
- Maintaining member and employer information – except those processes for employer reporting
- Accounting for retirement funds
- Promoting retirement readiness

In the scope of this Project, the selected PAS will replace all DRS’s remaining legacy applications. This includes DRS’:

- Member Information System (MIS)
- Benefits System (BS)
- Disbursements System (DS)
- Receivable Management System (AR, or sometimes referred to as Financial System (FS))

See the following exhibits for a complete description of the Services being requested, and the objectives for this Project.

- **Exhibit C – Project Expectations**, includes the implementation of the pension administration solution.
- **Exhibit D – Operating Expectations**, includes maintenance and operations of the pension administration solution.
- **Exhibit J – User Stories and Non-Functional Requirements**, includes technical and business Requirements for the pension administration solution.

1.3.2 Optional Scope

The Electronic Document Image Management System (EDIMS) is a system that manages the electronic images that make up a customer's file. The application also supports workflows to route documents to appropriate work queues.

A decision about whether the EDIMS must be replaced to meet the stated business goals/objectives will occur during the RFP discovery process with Bidders. DRS is interested in Bidder recommendations on whether to replace this system as part of this Project.

See **Exhibit J – User Stories and Non-Functional Requirements, Business Requirements Optional** for optional scope business Requirements. See **Exhibit B – Current Agency Technical Profile, Table 2 – Electronic Document Image Management System** for additional information on EDIMS.

1.3.3 Future Scope Description

While not in scope for this Project, DRS may be interested in replacing one or more of the following systems following the Initial Project implementation:

- Online account access
- Online Retirement Application
- Employer Reporting Application
- DRS Website

See **Exhibit E – Future Scope Description** for a description of future scope items. Future scope work may be addressed via work order as the Requirements become clearer. See **Exhibit B – Current Agency Technical Profile** for additional information on the systems listed above.

1.4 Americans with Disabilities Act (ADA)

DRS complies with the ADA. Bidders may contact the DRS RFP Coordinator to receive this RFP in an alternate format.

1.5 Definitions

Please refer to **Exhibit A – Definitions** for definitions of capitalized terms and acronyms used in this RFP and related Exhibits.

1.6 Period of Performance

It is DRS' intent to execute a Contract with the successful Bidder no later than June 2023. The initial period of performance for the contracted Services will be for a period of no more than six (6) years, from July 1, 2023, through June 30, 2029. This would include up to four (4) years for Project implementation and with the remaining period dedicated to ongoing maintenance and support.

DRS may extend the Contract for up to four (4) additional years, through June 30, 2033. The total Contract period, with extensions, will not exceed 10 years.

If a new PAS is selected as a result of this RFP, the term of the Contract will include an implementation period, such period to commence upon a date mutually agreed upon by the successful Bidder and DRS, but not later than June 30, 2023.

1.6.1

The Initial Project as defined in **Exhibit C – Project Expectations** will begin immediately following the date of Contract execution and must be completed no later than June 30, 2027.

1.6.2

At DRS' discretion, additional contracted Services may be requested in alignment with the scope of this RFP during the Term. These Services will be subject to pre-negotiated pricing schedules.

1.7 Minimum Solution Qualifications

The Bidder's Proposal must offer off-the-shelf solutions that, through inherent functionality (and configurability), substantially meet DRS' defined Requirements in **Exhibit J – User Stories and Non-Functional Requirements**.

- The Solution must be a cloud-hosted modified off-the-shelf product for pension administration that has been commercially available for a minimum of two (2) years and has been successfully implemented for a minimum of three (3) like-size customers.
- Bidder's hosting solution must be FedRAMP-certified and hosted within the geographical boundaries of the United States.

1.8 Minimum Bidder Qualifications

The Bidder's Proposal must provide evidence of meeting the minimum qualifications in this RFP section by completing **Exhibit G – Bidder's Information, Declarations and Certifications**. Proposals failing to provide such evidence may be rejected.

1.8.1 Retirement System Experience

The Bidder's experience must include three (3) years of work similar in scope to that outlined in this RFP for a customer with a defined benefit and/or defined contribution plan having a membership of at least 100,000 participants and at least 100 employers.

1.8.2 Data Conversion Experience

The Bidder or its designated Subcontractor must have two or more completed data conversion projects for pension systems with a total membership size of at least 10,000 members within the last three (3) years.

1.8.3 Key Personnel Experience

The proposed Key Personnel must have the following experience:

- **Project Manager:** Must have a minimum of seven (7) years of experience in project management within the last 10 years. That experience must include four (4) years of work

deploying the company's product (current and/or predecessor) and at least one (1) complex implementation with the Solution being proposed.

- **Client Manager, Project Director, and/or Engagement Manager:** Must provide at least one (1) Key Personnel with a minimum of four (4) years of experience with the company deploying the company's product (current and/or predecessor).
- **Security Officer:** Must have a minimum of five (5) years of current experience assuring privacy and security standards are met.
- **Other Key Personnel:** Any other Key Personnel must have performed significant roles in at least one (1) project of similar size and scope in the last three (3) years with the company's product (current and/or predecessor).

Bidders must verify that Key Personnel meet these minimum qualifications in their response to **Exhibit G – Bidder's Information, Declarations and Certifications, Minimum Solicitation Requirements** section.

1.9 References

1.9.1 Company References

Bidders should provide three (3) company references from customers who have received services similar in scope or magnitude to those requested in this RFP. Each reference must include the engagement name, name of the company, type of business, the name, telephone number, and email address of the contact person, and date and description of services provided. The contact person should be familiar with the services provided by the Bidder, why the Bidder was selected, the relationship of actual to estimated costs, and the current state of user satisfaction. Bidder must provide these references using **Exhibit H1 – Company References**.

1.9.2 Key Personnel and Subcontractor References

Bidders should provide three (3) professional references for each Key Personnel and Subcontractor. Each reference must include the role, name of the company, the name, job title, telephone number and email address of the contact person, and dates for the job performed. The contact person should be familiar with the work performed by the Bidder. Bidder must provide these references using **Exhibit H2 – Key Personnel and Subcontractor References**.

2. Procurement process

2.1 DRS RFP Coordinator

The DRS RFP Coordinator is the sole point of contact at DRS for this procurement. Throughout the duration of the procurement process, all questions and other communications concerning the procurement are to be directed in writing by mail or email to the contact listed below. Communications directed to other DRS team members or consultants under Contract with DRS may result in disqualification of the Bidder. Bidders should rely on written statements issued by the DRS RFP Coordinator. Any other communication will be considered unofficial and non-binding on DRS.

Table 1 – DRS RFP Coordinator Contact Information

DRS RFP Coordinator	Wendy Kancianich
Mailing Address	PO Box 48380 Olympia, WA 98504-8380
Street Address	6835 Capitol Blvd. SE Tumwater, WA 98501
Phone Number	360-664-7231
Text Telephone (TTY)	711
Email Address	drs.rfp@drs.wa.gov

2.2 Procurement Schedule

The following **Table 2 – Schedule of Procurement Activities** shows key dates for activities for this procurement, unless explicitly amended by DRS in writing. DRS reserves the right to revise the below schedule. Bidders should pay special attention to activities in the schedule shown in bold, as failure to meet those deadlines will result in disqualification to submit a Proposal. Bidders should allow for sufficient delivery time to ensure receipt of their Proposal prior to the deadline. Proposals received after the deadline will not be evaluated.

Table 2 – Schedule of Procurement Activities

Activity	Due Dates
Official publication of RFP	November 28, 2022
Optional Pre-Bid Conference (online)	December 8, 2022, 9 am – 11 am Pacific Time <i>Attend via Video Conference</i> Meeting information: Meeting Link: https://us02web.zoom.us/j/85075895662 Meeting ID: 850 7589 5662 Passcode: 926770 Meeting ID: 850 7589 5662 Find your local number: https://us02web.zoom.us/j/85075895662
Written questions due	December 16, 2022
Answers to written questions posted	December 23, 2022
Amendment(s) posted (as needed)	No later than December 30, 2022
Last day to submit a complaint	January 20, 2023
Proposals due	January 27, 2023, 4 pm Pacific Time
Notify finalists	February 17, 2023
On-site Evaluations (at DRS’ discretion)	March 6, 2023 – March 23, 2023

Activity	Due Dates
Provide final Bidder(s) with instructions for Best and Final Offer and User Story clarification (as needed)	March 31, 2023
Responses due	April 7, 2023, 4 pm Pacific Time
Reference checks (at DRS' discretion)	March 31, 2023 – April 12, 2023
Announcement of Apparent Successful Bidder (ASB) and begin Contract negotiations	April 14, 2023
Notification to unsuccessful Bidders	April 14, 2023
Last day to request a debriefing conference	Three (3) Business Days after ASB announcement
Last day to submit a protest	Five (5) Business Days after debriefing*
Execute Contract	June 15, 2023
Estimated start date of work	July 3, 2023

* Aggrieved foreign Bidders from World Trade Organization (WTO) Government Procurement Agreement (GPA) signatory nations may file a protest up to 10 Calendar Days following the debriefing. DRS reserves the right to revise the above schedule.

2.3 Pre-Proposal Process

2.3.1 RFP Revisions and Amendments

DRS reserves the right to amend the RFP and revise the RFP schedule at any time. If it becomes necessary to revise any part of this RFP, DRS will issue an amendment to the RFP by the date and time specified **Table 2 – Schedule of Procurement Activities in Section 2.2, Procurement Schedule** by posting the amendment to Washington’s Electronic Business Solution (WEBS).

If a conflict exists between amendments, or between an amendment and the RFP, the document issued last shall take precedence. It is the Bidder’s responsibility to keep apprised of any Amendments or Addenda to this RFP.

2.3.2 Optional Pre-Bid Conference

DRS will host a pre-bid conference at the time and location indicated in **Table 2 – Schedule of Procurement Activities**. Attendance is not mandatory. However, Bidders are encouraged to attend and participate. The purpose of the pre-bid conference is to clarify the RFP as needed and address any issues or concerns that Bidders may have.

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

2.3.3 Questions and Answers

It is incumbent upon each potential Bidder to carefully examine the RFP requirements, terms, and conditions. Should any potential Bidder find discrepancies, omissions or ambiguities in this RFP, the

Bidder may request, in writing, an interpretation or clarification from the DRS RFP Coordinator. DRS must receive all written inquiries and correspondence from Bidders by the date and time shown in **Table 2 – Schedule of Procurement Activities**. DRS will provide written answers by the date shown in **Table 2 – Schedule of Procurement Activities**. DRS reserves the right to respond to and post questions and answers as they are received. If posting occurs prior to December 23, posting will occur on Friday.

Questions raised during the question-and-answer period will be answered and responses posted to WEBS. Any changes to the information in this RFP will also be posted to WEBS.

Bidders may only rely on written statements issued by the DRS RFP Coordinator. Any oral communications are unofficial and are not binding on DRS.

2.3.4 Complaint Procedure

(a) PRE-PROPOSAL COMPLAINT

A potential Bidder that believes this solicitation is inherently flawed may file a complaint up to 10 Business Days prior to the due date for Proposals. Grounds for the complaint may include:

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

Bidders should note that, if they choose not to file a complaint, they waive their right to file a protest based on the Proposal process that could have been raised as a pre-proposal complaint.

(b) COMPLAINT SUBMISSION

The complaint must be submitted in writing by mail or email to the DRS RFP Coordinator shown in **Section 2.1, DRS RFP Coordinator**, of this RFP, no later than 10 Business Days before the Proposal deadline.

(c) CONTENTS OF COMPLAINT

The complaint must contain:

- The complainant's name, mailing address, telephone number and email address
- A clear and specific statement articulating the basis for the complaint
- A proposed remedy

(d) DRS' RESPONSE TO A COMPLAINT

DRS will send a written response to the complainant no later than five (5) Business Days before the Proposal deadline. The response will explain DRS' decision and any steps it will take in response to the complaint. The complaint and the response, including any changes to the solicitation that may result, will be posted on the DRS website and on WEBS.

2.4 Proposal Requirements

2.4.1 Submission Requirements

Proposals must conform to the requirements described in this RFP and all exhibits, including any Amendments to the RFP, DRS' responses to questions, and other communications per **Section 2, Procurement Process**. Proposals should be concise, with emphasis placed on completeness and clarity of content.

When preparing the Proposal, Bidders must consider Minimum Qualifications, Required Services, and Future Scope. The Proposal must comply with each of the following requirements to be considered responsive:

- Minimum Qualifications, as described in the following sections:
 - **Section 1.7, Minimum Solution Qualifications**
 - **Section 1.8, Minimum Bidder Qualifications**
- Required Services, as described in the following Exhibits:
 - **Exhibit C – Project Expectations**
 - **Exhibit C1 – Governance, Accountability and Oversight Plan**
 - **Exhibit C2 – Deliverable Expectation Document**
 - **Exhibit D – Operating Expectations**
 - **Exhibit I – Fee Proposal Instructions**
 - **Exhibit I1 – Fee Proposal Workbook**
- Technical and Business Requirements, as described in Exhibit J – User Stories and Non-Functional Requirements
- General Terms and Conditions, as described in **Exhibit F – General Terms and Conditions**, and the following Exhibits:
 - **Exhibit F1 – Incident and Problem Management**
 - **Exhibit F2 – Insurance Requirements**
 - **Exhibit F3 – Security and Data Protection Controls**
 - **Exhibit F4 – Service Level Agreement**
- Optional Services, as described in **Exhibit C – Project Expectations, Section 1.5.2, Optional Scope** and **Exhibit J – User Stories and Non-Functional Requirements, Business Requirements Optional**
- Potential future enhancements, as described in **Exhibit E – Future Scope Description**

Bidders must submit a copy of the complete Proposal by email to DRS. **No paper copy is required.**

The electronic Proposal must arrive at DRS no later than 4 pm, Pacific Time, on the Proposal due date shown in **Table 2 – Schedule of Procurement Activities**. The Proposal should be sent to drs.rfp@drs.wa.gov with the following subject line:

DRS-RFP 22-07

“Zipped” attachment files are not accepted by DRS email security and are not acceptable formats for Bidder’s Proposal documents. The maximum size DRS can accept per email is 35 MB.

Bidders should allow sufficient delivery time to ensure timely receipt of their Proposals by the RFP Coordinator. DRS assumes no responsibility for delays caused by any email delivery service. Proposals received after the deadline will be considered non-responsive and will be disqualified from further consideration.

All Proposals and any accompanying documentation become the property of DRS and will not be returned.

2.4.2 Submission Checklist

The digital submission must include:

Table 3 – RFP Submission Checklist

✓	Required Document	Naming Convention
<input type="checkbox"/>	Cover Letter Cover Table of Contents	22-07<Bidder name>1-Cover.docx
<input type="checkbox"/>	Exhibit G – Bidder’s Information, Declarations and Certifications	22-07 <Bidder name>2-Info.docx
<input type="checkbox"/>	Exhibit H – Bidder’s Questionnaire, with the following attachments included:	22-07 <Bidder name>3-Quest.docx
<input type="checkbox"/>	Current Roadmap	22-07 <Bidder name>4-Map.pdf
<input type="checkbox"/>	Technical Reference Model for PAS	22-07 <Bidder name>5-Arch.docx
<input type="checkbox"/>	High-Level Work Plan and Schedule	22-07 <Bidder name>6-Project.docx
<input type="checkbox"/>	Configuration Documentation Sample	22-07 <Bidder name>7-Config.pdf
<input type="checkbox"/>	Data Conversion Plan Sample	22-07 <Bidder name>8-Data.pdf
<input type="checkbox"/>	Written Security Policies, Standards and Practices	22-07 <Bidder name>9-Sec.pdf
<input type="checkbox"/>	Company Financial Statements	22-07 <Bidder name>10-Fin.pdf
<input type="checkbox"/>	Project Organizational Chart	22-07 <Bidder name>11-Org.pdf
<input type="checkbox"/>	Project Roles and Responsibilities	22-07 <Bidder name>12-Roles.pdf
<input type="checkbox"/>	Resumes for Key Personnel, including: <ul style="list-style-type: none"> • Project Manager • Engagement Manager • Security Officer • Other Key Personnel (as needed) 	22-07 <Bidder name>13-ResPM.pdf 22-07 <Bidder name>13-EMRes.pdf 22-07 <Bidder name>13-SORes.pdf 22-07 <Bidder name>13-KPORes1.pdf Etc.
<input type="checkbox"/>	Exhibit H1 - Company References	22-07 <Bidder name>14-CompRef.pdf
<input type="checkbox"/>	Exhibit H2 – Key Personnel References, including: <ul style="list-style-type: none"> • Project Manager 	22-07 <Bidder name>15-PMRef.pdf 22-07 <Bidder name>15-EMRef.pdf

✓	Required Document	Naming Convention
	<ul style="list-style-type: none"> • Client Manager, Project Director and/or Engagement Manager • Security Officer • Other Key Personnel (as needed) 	22-07 <Bidder name>15-SORef.pdf 22-07 <Bidder name>15-KPORef1.pdf Etc.
<input type="checkbox"/>	Exhibit F – General Terms and Conditions	22-07 <Bidder name>16-GTC.docx
<input type="checkbox"/>	Exhibit I1 – Fee Proposal Workbook	22-07 <Bidder name>17-Fee.xls
<input type="checkbox"/>	Exhibit J – User Stories and Non-Functional Requirements	22-07<Bidder name>18-Reqs.xls
<input type="checkbox"/>	Exhibit K – Joint Resource Plan	22-07<Bidder name>19-JRP.xls
<input type="checkbox"/>	Exhibit L – Inclusion Plan Template	22-07<Bidder name>20-Incl.xls
<input type="checkbox"/>	Other Attachments (if needed) <ul style="list-style-type: none"> • Referenced documents and/or other materials 	22-07<Bidder name>21-Attach1.pdf Etc.

2.4.3 Submission Format

Each major section must be separated by a page break, presented in the order shown and must include the following:

(a) COVER

The following elements must be shown on the front cover of the Proposal:

- Company name: The Proposal must be submitted in the name of the legal entity that will bear responsibility for fulfilling the terms of the Contract.
- Bidder’s RFP Contact information: Name, title, email and telephone number(s) for the purpose of communications related to this Proposal.
- RFP Number and Title: DRS RFP 22-07, CORE: Pension Administration Modernization

(b) TABLE OF CONTENTS

Include a table of contents showing the Proposal’s content and sequence. All pages should be numbered, and each section must reference the corresponding requirement described in this RFP.

(c) COVER LETTER

Provide a brief introduction to your company and highlights of your qualifications.

(d) BIDDER’S INFORMATION, DECLARATIONS AND CERTIFICATIONS

Submit the following information using **Exhibit G – Bidder’s Information, Declarations and Certifications**:

- Bidder’s Information
- Certifications and Assurances

- Company Declarations
- Wage Theft Certification
- Executive Order 18-03 – Workers’ Rights Certification
- Washington Small Business status
- Veteran-Owned Business status
- COVID-19 Contractor Verification Plan
- Minimum Solution Qualifications
- Minimum Bidder Qualifications

(e) BIDDER’S QUESTIONNAIRE

Provide your responses to all fields and questions included in **Exhibit H – Bidder’s Questionnaire**.

Provide all items requested below by attaching/embedding the following documents in the Attachments section of the questionnaire, using the file naming convention in **Table 3 – RFP Submission Checklist** above, including:

- Current Roadmap
- Proposed High-Level Work Plan and Schedule
- Technical Reference Model for PAS
- Configuration Documentation Sample
- Data Conversion Plan Sample
- Written Security Policies, Standards and Practices
- Company Financial Statements – Provide a copy of, or a link to, four (4) years of your most recent independently audited company financial statements.
- Project Organizational Chart
- Project Roles and Responsibilities
- Resumes for Key Personnel:
 - Project Manager
 - Client Manager
 - Security Officer
 - Other Key Personnel (as needed)
- Company References – Use **Exhibit H1 – Company References**.
- References for Key Personnel – Use **Exhibit H2 – Key Personnel and Subcontractor References** to provide references for:
 - Project Manager
 - Client Manager
 - Security Officer
 - Other Key Personnel (as needed)

(f) GENERAL TERMS AND CONDITIONS RESPONSE

Bidders must use **Exhibit F – General Terms and Conditions** to submit a complete response to the included terms and conditions.

(g) FEE PROPOSAL

Provide your Fee Proposal following the instructions in **Exhibit I – Fee Proposal Instructions** and using **Exhibit I1 – Fee Proposal Workbook** for your response. Include all fees proposed to be charged to DRS for pension administration modernization and ongoing support services.

Note: All charges must be detailed in your Fee Proposal. Charges not listed in this section of the Bidder's Proposal will not be allowed during the performance of the Contract unless the scope of the Contract is expanded to include additional services not requested herein and is otherwise negotiated and agreed to by DRS and the Bidder in a written amendment.

(h) TECHNICAL AND BUSINESS REQUIREMENTS

Provide your proposed responses using the format provided in **Exhibit J – User Stories and Non-Functional Requirements**. Business requirements are in the **Business Requirements PAS** worksheet and technical requirements are in the **Technical Requirements** worksheet.

Identify whether you meet each Requirement as a core capability, a configuration option, with minor customization, with major customization, or would not meet the Requirement. Bidders must identify the software/module that will be used to meet the Requirement or provide a brief written response when customization would be necessary. Bidder responses will be scored as part of the written evaluation based on how well the response aligns with the corresponding user need or Requirement.

(i) JOINT RESOURCE PLAN

Provide your Joint Resource Plan response using the format provided in **Exhibit K – Joint Resource Plan**.

(j) INCLUSION PLAN

Provide your completed Inclusion Plan using **Exhibit L – Inclusion Plan Template**.

(k) OTHER ATTACHMENTS

Provide all additional information and attachments as described below.

1. **Referenced documents:** Provide examples and other documents referenced in previous sections of your Proposal.
2. **Additional materials:** Provide any additional information or materials the Bidder deems relevant to this RFP. Such supplementary information must be directly related to the services described in this RFP. Do not include general marketing materials.

2.4.4 Proprietary Information/Public Disclosure

Materials submitted in response to this competitive procurement shall become the property of DRS. Following announcement of the ASB, the Proposals shall be deemed public records as defined in [Chapter 42.56 RCW](#), “Public Records Act.”

Any information in the Proposal that the Bidder desires to claim as proprietary and exempt from disclosure under the provisions of [Chapter 42.56 RCW](#) must be clearly designated. The page must be identified as well as the particular exemption from disclosure upon which the Bidder is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word “Confidential” printed on the bottom right corner of the page.

DRS will consider a Bidder’s request for exemption from disclosure; however, DRS will make its determination predicated upon [Chapter 42.56 RCW](#). Marking the entire Proposal exempt from disclosure will not be honored. The Fee Proposal will not be exempt from disclosure, even if it is marked as such. The Bidder must be reasonable in designating information as confidential. If any information is marked as proprietary in the Proposal and DRS determines that there is a good faith legal basis to conclude that the information is exempt of disclosure under [Chapter 42.56 RCW](#), such information will not be made available until the affected Bidder has been given an opportunity to seek a court injunction to prevent the requested disclosure.

3. Evaluation Process

3.1 Award Based on Multiple Factors Including Best Value

The evaluation process is designed to award the Contract to the Bidder whose Proposal best meets the requirements of this RFP. The highest scoring Bidder(s) during Written Evaluation will move forward to the On-Site Evaluation step of the procurement process. The Final Selection, if any, will be based on the evaluation team’s recommendation after analysis of the Proposal, including responses to the Bidder’s Questionnaire, the Bidder’s Fee Proposal, Presentations and On-Site Evaluations. See **Section 3.6, Final Selection**, for additional information.

In accordance with [RCW 39.26.160](#), DRS will select the lowest responsive and responsible Bidder. In determining whether a Bidder is responsible, DRS will assess:

- The ability, capacity and skill of the Bidder to perform the Contract or provide the services required;
- The proposed PAS;
- The character, integrity, reputation, judgment, experience and efficiency of the Bidder;
- Whether the Bidder can perform the Contract within the time specified;
- The quality of performance of previous Contracts or services that are of similar scope and scale to this procurement;
- The previous and existing compliance by the Bidder with laws relating to the Contract or services described in this RFP;

- Whether, within the three- (3-) year period immediately preceding the date of the bid solicitation, the Bidder has 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 entered by a court of limited or general jurisdiction to have willfully violated, as defined in [RCW 49.48.082](#), any provision of [Chapters 49.46](#) (Minimum wage requirements and labor standards), [49.48](#) (Wages-Payment-Collection), or [49.52 RCW](#) (Wages-Deductions-Contributions-Rebates); and
- Such other information as may be secured having a bearing on the decision to award the Contract.

In determining the lowest responsive and responsible Bidder, DRS may consider best value criteria. The evaluation process is designed to award this procurement not necessarily to the Bidder presenting the lowest cost, but rather to the Bidder whose Proposal best meets the requirements of this RFP.

3.2 Evaluation Steps

DRS will use a four-step evaluation process to select the PAS Bidder as follows:

1. Administrative Screening
2. Written Evaluation
3. On-Site Evaluation
4. Final Selection

These steps are described in further detail in the following sections.

3.3 Administrative Screening

The purpose of the Administrative Screening is to confirm that the Bidder's Proposal meets the administrative requirements and instructions specified in this RFP. All Proposals will be reviewed by the DRS RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. Proposals meeting all administrative requirements and passing all Minimum Solicitation Requirements will pass to the Written Evaluation phase. Any Bidder Proposal that fails to comply with any part of the RFP may be rejected as non-responsive.

During Administrative Screening, DRS will read and review the Bidder's Company Financial Statements, including financial information from the Bidder's independent auditor's report, audited financial statements and related notes, and required supplemental information, if applicable.

DRS reserves the right, at its sole discretion, to waive minor administrative irregularities. DRS also reserves the right, at its sole discretion, to reject all Proposals received without penalty and not to issue a Contract as a result of this RFP.

3.4 Written Evaluation

Proposals that pass Administrative Screening would move on to the Written Evaluation step. During this step, Bidder Proposals will be evaluated based on the Evaluation Weighting Criteria in **Table 4 – Written Evaluation Weighting Criteria** below. Written Proposals will be reviewed by an evaluation team, to be

designated by DRS, which will determine the Proposal most responsive to the requirements stated in this RFP. Proposals will be evaluated strictly in accordance with the requirements set forth in this RFP and any addenda that are issued.

Table 4 – Written Evaluation Weighting Criteria

Criteria	% of Total Score
Exhibit H – Bidder’s Questionnaire, Exhibit K – Joint Resource Plan and Exhibit I1 – Fee Proposal Workbook	
I. Company Overview	0%
II. Proposed Technology Solution	10%
III. Evaluation of Document Management System (Optional Scope)	2%
IV. Future Scope Approach	3%
V. Project Approach <ul style="list-style-type: none"> • Project Planning and Management • Organizational Change Management • Solution Architecture and Hosting • Product Management • Data Conversion • Deployment • Post-Implementation Support 	15%
VI. Operating Approach <ul style="list-style-type: none"> • General Information • Conforming to Compliance Requirements • Release Management • DRS Enhancements • Service Desk Support • Document Management • System Monitoring 	14%
VII. Security and Data Protections Controls	5%
VIII. Staffing Model <ul style="list-style-type: none"> • Key Personnel • Subcontractors • Joint Resource Plan 	5%
Exhibit J – User Stories and Non-Functional Requirements	
IX. User Stories and Non-Functional Requirements - PAS	20%
X. User Stories – Optional Scope	1%
Exhibit I1 – Fee Proposal Workbook	
XI. Cost <ul style="list-style-type: none"> • Initial Software License Fees 	10%

Criteria	% of Total Score
<ul style="list-style-type: none"> • Renewal Software License Fees • Project Services Payment Schedule • Operating Services Payment Schedule • Professional Services Rates 	
Exhibit B – General Terms and Conditions Response	
XII. Terms and Conditions	10%
Exhibit G – Bidder’s Information, Declarations and Certifications	
XIII. No Mandatory Arbitration Clauses for Workers	2%
XIV. Washington Small Business or Veteran-Owned Business	3%
Total	100%

3.5 On-Site Evaluation

After evaluation of the written Proposals, DRS, at its sole discretion, may invite the highest ranked Bidders for On-Site Evaluations. This step will include a presentation, discussions, a software demonstration, and interviews. Bidders will be required to sign a Non-Disclosure Agreement prior to the On-Site Evaluation. The Bidder must be available on-site at DRS during the dates shown in **Section 2.2, Procurement Schedule**, or may be eliminated from further consideration. Commitments made by the Bidder during this phase of the process will be considered binding. Bidders will be asked to elaborate on the elements of their Proposals; however, no substantive changes can be made to a Bidder’s Fee Proposal unless requested by DRS.

Key members of Bidder’s proposed implementation and operations teams must be on-site to participate in the presentations, discussions, software demonstration, and interviews. DRS’ objective is to discern the Bidder’s proposed Project teams’ familiarity with the PAS and their ability to explain, communicate, converse and interact with DRS team members.

DRS reserves the right to conduct the On-Site Evaluations remotely.

3.5.1 On-Site Evaluation Process

The highest scoring Bidder(s) will be invited to send a team to DRS to assess DRS’ current pension administration systems and processes on Days 1-3 of the On-Site Evaluation. On the fourth and final day of the On-Site Evaluations, Bidders will present their assessment, demonstrate software functionality and interview.

(a) DAY 1: DRS PRESENTATIONS AND SECURITY INTERVIEW

The first day of the On-Site Evaluation will include the following DRS presentations:

- An overview of our agency, our systems and plans.
- A presentation of existing technology and interfaces.
- A high-level review of existing data.

- An introduction to DRS' User Stories and Non-Functional Requirements, with a focus on the unique business needs of Washington state.
- An introduction to three (3) complex scenarios and modernization opportunities for the Bidder to configure in their solution and demonstrate on Day 4.

The Bidder will provide an overview of its current:

- Technical systems and architecture
- Batch and interface (API) approach
- Data migration approach

DRS will interview the Bidder's Chief Information Security Officer (CISO)/team. This will include a review of the Washington State Security Design Review requirements.

(b) DAY 2: BUSINESS PROCESSES/USER STORIES WORKING SESSION

On the second day, DRS will lead working sessions to review Business Processes/User Stories with the Bidder and team. This will include walking through the three (3) complex scenarios identified by DRS for the Bidder to demonstrate on Day 4 and answering Bidder questions about these scenarios. It will also include answering Bidder questions about the three (3) standard scenarios the Bidder will demonstrate on Day 4.

(c) DAY 3: QUESTIONS AND ANSWERS SESSIONS

On the third day, DRS and the Bidder have the opportunity conduct additional discovery. DRS will lead a general question and answer session with the Bidder and their team. Then, key DRS Project team members will be available to answer Bidder questions.

Resources available to the Bidder team(s) will include:

- A dedicated workspace at DRS for Bidder team(s)
- Reasonable access to DRS team members, including, but not limited to:
 - CORE: PAM Project Sponsors
 - CORE: PAM Project Director, Senior Project Manager and Organizational Change Manager
 - Business Systems Analyst(s)
 - Chief Information Security Officer
 - Subject Matter Experts (SMEs)
- Meeting room, with meeting technology and whiteboards (for presenting findings to evaluators)
- Access to wireless internet

(d) DAY 4: BIDDER PRESENTATION, SOFTWARE DEMONSTRATION AND INTERVIEW

On the fourth and final day, the Bidder will be expected to present, demonstrate software and interview. The Bidder's presentation should reflect learning gained during Days 1-3 of the On-Site

Evaluation process. The Bidder’s software demonstration should demonstrate key software functionality that meets requirements for the three (3) complex scenarios provided on Day 1, including time for questions and answers, as well as the three (3) standard scenarios selected by the Bidder. Finally, the Evaluators will interview the Bidder and team. Evaluators may ask the Bidder specific questions regarding the Bidder’s written Proposal, presentation, software demonstration, or knowledge gained during the week.

3.5.2 On-Site Evaluation Weighting

Scores from the Written Evaluation phase do not carry over to the On-Site Evaluation step. During On-Site Evaluations, Bidders will be evaluated using the weighting found below.

Table 5 – On-Site Evaluation Weighting Criteria

Criteria	% of Total Score
Presentation	33%
Demonstration	42%
Interviews	25%
Total	100%

More information will be provided to Bidders who are invited to participate in this stage of the process.

3.6 Final Selection

Final Selection will include checking the Bidder’s Company and Key Personnel references provided by the Bidder using **Exhibit H1 – Company References** and **Exhibit H2 – Key Personnel and Subcontractor References**. This step may also include a Best and Final Offer, at DRS’ discretion.

Reference checks will be conducted prior to selecting the ASB. DRS will make reasonable efforts to contact the references provided as logistics and time allow, but DRS will have no obligation to actively pursue such contacts. At DRS’ discretion, reference checks may only be conducted for the top ranked Bidder(s). DRS reserves the right to request and consider information from sources other than those provided in the Bidder’s Proposal. Information obtained from references will not be scored but will be considered when making the final ASB selection.

DRS reserves the right to award a Contract on the basis of initial offers received without discussions. Therefore, each initial offer should contain the Bidder’s best terms from Project, operating and cost standpoints.

However, DRS also reserves the right to enter into discussions/negotiations with one (1) or more Bidders and to subsequently request the submission of Best and Final Offers from those Bidders who, after the conclusion of such discussions/negotiations, are still under consideration for award. No Bidder shall have any rights against DRS arising from an invitation to enter into discussions/negotiations or to submit a Best and Final Offer.

The final selection of the ASB will be based on an assessment of the entire procurement process including:

- Written Proposal
- Fee Proposal
- Pre-Assessment
- Presentation
- Interview
- Software Demonstration
- References, as applicable

DRS will notify the ASB of its selection prior to posting the notice on the DRS website and in WEBS. If telephone contact is unsuccessful, an email sent to the ASB's RFP Coordinator will satisfy this notification requirement. Bidders whose Proposals have not been selected for further negotiation or award will also be notified by telephone or email.

3.7 Debriefing Conference

After DRS has notified Bidders of the ASB, an unsuccessful Bidder may request a debriefing conference. The RFP Coordinator must receive the request no later than three (3) Business Days after notification of the ASB.

DRS will hold the debriefing conference within three (3) Business Days of the request unless it extends that time period and explains to the requester the reason(s) for the time extension. The debriefing conference will be conducted by telephone and will be scheduled for a maximum of one (1) hour.

The purpose of the debriefing conference is to give the Bidder insight into how its Proposal might have better met the RFP requirements. The scope of the debriefing conference will be limited to the Bidder's Proposal. The debriefing conference will not include a comparison to other Bidders' Proposals, scores or evaluations.

Bidders should note that the protest provisions allowed under this RFP are available only to those Bidders that have timely requested and participated in a debriefing conference. A Bidder that fails to do so waives its right to protest.

3.8 Protest Procedure

No protest may be submitted until after DRS has announced the ASB. After that announcement, an unsuccessful Bidder who timely requested and participated in a debriefing conference may file a protest.

DRS reserves the right to reject, without consideration, any protest that does not comply with any requirement in this section.

The protest must be emailed to the RFP Coordinator within five (5) Business Days after the completion of the protester's debriefing conference, as referenced in **Table 2 – Schedule of Procurement Activities**.

DRS will only consider a protest that is factually and unambiguously based on one or more of the following grounds:

- Errors in the scoring of the protester's bid.
- Failure to follow RFP procedures.
- Failure to follow applicable law or rule.
- Bias, discrimination or conflict of interest negatively affecting the protester's evaluation or interests.
- The protest must be signed by a person authorized to bind the protester to a contractual relationship.

The protest must contain:

- The name, mailing address, telephone number and email address of the person responsible for submitting the protest.
- A clear and factually specific statement of the ground(s) for the protest.
- A complete and specific statement of the relief or corrective action requested.

Upon receipt of a protest, DRS will conduct a protest review. An individual who was not involved in the solicitation process and who is appointed by the DRS Director will objectively review the information submitted by the protester, as well as other relevant facts known to DRS.

If a protest directly affects another Bidder's interests, DRS will give that Bidder an opportunity to submit its views and any relevant information to the RFP Coordinator. DRS will resolve the protest by making appropriate findings and deciding on an appropriate course of action. DRS may find, for example, that:

- The protest lacks merit, and the procurement process will be upheld.
- Only technical or harmless errors occurred, which had no significant effect on the fairness or legality of the procurement process, and the procurement will be upheld.
- The protest has merit, and DRS will take corrective action such as (but not limited to) reevaluating all Proposals, cancelling the RFP or reissuing the RFP.
- DRS will send its written response to the protester within 10 Business Days after receiving the protest unless it extends that time.

3.9 Procurement Evaluation for Executive Order 18-03 – Supporting Workers' Rights

Pursuant to [RCW 39.26.160](#) (best value criteria) and consistent with [Executive Order 18-03 – Supporting Workers' Rights to Effectively Address Workplace Violations](#) (dated June 12, 2018), DRS will evaluate bids for best value and provide a bid preference in the amount of two (2) percent towards Bidder's Written Evaluation score (as noted in **Table 4 – Written Evaluation Scoring Criteria**) to any Bidder who certifies, pursuant to the certification provided in **Exhibit G – Bidder's Information, Declarations and Certifications**, that their company does NOT require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waiver.

3.10 Procurement Evaluation for Small and Diverse Businesses

DRS, in accordance with Washington law, encourages small and diverse businesses to compete for and participate in State procurements as contractors and subcontractors to awarded bidders. See, for example [RCW 39.19](#) (OMWBE certified businesses); [RCW 43.60A.200](#) (WDVA certified veteran-owned businesses); and [RCW 39.26.005](#) (Washington small businesses).

To encourage supplier diversity in this procurement, DRS is:

- Offering an optional pre-bid conference;
- Requiring Bidders to submit an Inclusion Plan to identify where they intend to use Subcontractors to fulfill Contract terms;
- Awarding three (3) percent towards Bidder's Written Evaluation score (as noted in **Table 4 – Written Evaluation Scoring Criteria**) to Bidders who certify, pursuant to the certification provided in **Exhibit G – Bidder's Information, Declarations and Certifications**, that their company is a small (as defined in [RCW 39.26.010 \(22\)\(a\)\(i\)\(ii\)](#)) and/or Veteran-owned business and certified by OMWBEs, and
- Committed to paying Bidder invoices within fifteen (15) Calendar Days of receipt and meeting deliverable acceptance criteria.

3.11 WEBS Registration

Bidders interested in contracting opportunities with DRS or any State agency should register for competitive solicitation notices at the [WEBS Registration website](#). Note: There is no cost to register on WEBS.

3.12 Single Proposal

If DRS receives only one (1) Proposal in response to this RFP, DRS may, at its sole option, cancel this RFP or award the Contract to the single Bidder.

3.13 Clarification of Proposal

The DRS RFP Coordinator may contact the Bidder for clarification of any portion of the Bidder's Proposal at any time throughout the evaluation process.

4. Administrative Requirements

This section describes the administrative requirements Bidders must meet for this RFP.

4.1 Acceptance Period

Proposals must provide 180 Calendar Days for acceptance by DRS from the due date for receipt of Proposals.

4.2 Bidder's Understanding of the RFP

In responding to this RFP, the Bidder fully accepts responsibility for understanding the RFP in its entirety and in detail, including submitting questions necessary to gain such understanding. DRS reserves the

right to disqualify any Bidder who demonstrates less than such understanding. Further, DRS reserves the right to determine, at its sole discretion, whether the Bidder has demonstrated such understanding. That right extends to cancellation of award if award has been made. Such disqualification and/or cancellation shall be at no fault, cost or liability whatsoever to DRS.

4.3 Commitment of Funds

The DRS Director is the only individual who may legally commit DRS 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.

4.4 Contract Award

DRS will notify the selected Bidder of its acceptance of the Bidder's Proposal and of DRS' intent to enter into a contract in with substantially the same terms and conditions **Exhibit F – General Terms and Conditions**, plus additional terms and conditions negotiated during Contract negotiations. If said Vendor does not execute the contract within 60 Calendar Days of notification of ASB announcement, DRS may withdraw the award from that Bidder and award the Contract to the Bidder ranked second in the Proposal evaluation process.

4.5 Contractual Requirements

The Terms and Conditions section of this RFP contains some key terms and conditions DRS requires in the Contract. Bidders must respond using **Exhibit G – Bidder's Information, Declarations and Certifications and Certifications**. Final Contract terms will be negotiated during Contract negotiations. In no event may the Bidder provide its own standard contract.

4.6 Cost to Propose

DRS is not liable for any costs incurred by the Bidder in preparation of a Proposal submitted in response to this RFP, in conduct of a presentation or for any other activities related to responding to this RFP.

4.7 Conflict of Interest

It is the expectation of DRS that the award of a Contract for the Project and the conduct of business under the Contract will comply with the State's conflict of interest laws. Any act by the Bidder or any of its employees or representatives which would constitute a violation of the Ethics in Public Service Act, [Chapter 42.52 RCW](#), or any similar statute in relation to the submittal of its Proposal, will result in the Bidder being disqualified for further consideration.

4.8 Prime Contractor and Subcontractors

DRS is seeking a single prime contractor for all activities related to the new PAS implementation. The Bidder ("prime contractor") shall be granted the right to subcontract a portion of the work but shall retain sole responsibility for the successful delivery of all contracted deliverables. The Bidder (prime contractor) must be designated in the Proposal, and any use of Subcontractors must be clearly explained.

If the use of Subcontractors is planned, the Proposal must specifically identify the Services that each Subcontractor is to perform. All Subcontractor staff in Key Personnel roles must meet the same qualifications for experience specified for the prime contractor. Resumes must be included for these Subcontractors in Key Personnel roles.

Prior to Contract execution, Subcontractors must provide DRS the opportunity to review Subcontractor agreements upon request. DRS reserves the right to reject any Subcontractor or the specific agreement between contractor and Subcontractor. Substitution of any proposed Subcontractor is allowed only after prior written permission is received from DRS.

4.9 Most Favorable Terms

DRS 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 that the Bidder can propose. After the deadline for submitting Proposals has passed, the Bidder may not amend a submitted Proposal and may not submit supplemental material or information, unless specifically requested by DRS. DRS 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 DRS.

The "Best and Final Offer" is an option available to DRS under the RFP process allowing one or more Bidders to submit a best and final offer. Bidders may be contacted asking that they submit their best and final offer. Bidders should not submit a best and final offer unless contacted by DRS. DRS reserves the right to negotiate with the ASB for any type or combination of fee structures.

4.10 No Obligation to Contract

This RFP does not obligate the state of Washington or DRS to contract for services specified herein. The ASB is advised that the Contract is valid and enforceable only if sufficient funds have been appropriated by the Washington State Legislature. Additionally, the Contract is subject to any additional restrictions, limitations, or conditions enacted, which may affect its provisions, terms, or funding.

4.11 Publicity

No informational pamphlets, notices, press releases, research reports and/or similar public notices concerning this procurement may be released by the ASB without obtaining prior written approval from DRS.

4.12 Records Retention

DRS will retain one master copy of each unsuccessful Proposal for a period of three (3) years following the date of Contract execution. DRS will retain the Proposal from the successful Bidder for a period of six (6) years following expiration of the Contract resulting from this procurement.

4.13 Compliance with Agency Policies

Bidders must comply with all applicable agency practices, standards and policies. This includes the Bidder complying in all respects with physical, safety and other DRS security regulations when on-site. See **Exhibit M – Agency Policies** for additional information.

4.14 Withdrawal of Proposals

Bidders may withdraw a Proposal that has been submitted at any time up to the Proposal due date and time set forth in the **Table 2 – Schedule of Procurement Activities**. A written request to withdraw, signed by the Bidder Contracting Officer, must be submitted to the RFP Coordinator by email pursuant to **Section 2.1, DRS RFP Coordinator**. After withdrawing a previously submitted Proposal, the Bidder may submit another Proposal at any time up to the Proposal due date and time set forth in the **Table 2 – Schedule of Procurement Activities**.

4.15 World Trade Organization (WTO) Government Procurement Agreement (GPA)

Washington state adheres to the WTO GPA. The WTO GPA is an international treaty to which the United States is a signatory. This procurement will be conducted in accordance with the terms of the WTO GPA. Bidders from other WTO GPA signatory nations, that meet the qualifications required in this RFP, are encouraged to submit Proposals and will be given full consideration.

4.16 COVID-19 Contractor Verification Plan

DRS expects contractors (and their Subcontractors) who come on-site to comply with DRS' Workplace Safety Protocols by being fully vaccinated. A person is considered "fully vaccinated" two (2) weeks after their second dose in a two-dose vaccine series, such as the Pfizer or Moderna vaccines, or two (2) weeks after a single-dose vaccine, such as the Johnson & Johnson vaccine. DRS requires its contractors to assume responsibility for verification of COVID-19 vaccination and booster as well as handling disability and religious accommodation requests. DRS reserves the right to verify compliance. Bidders must provide certification of meeting these obligations using **Exhibit G – Bidder's Information, Declarations and Certifications**.

5. Exhibits

- A. Definitions
- B. Current Agency Technical Profile
- C. Project Expectations
 - C1 – Governance, Accountability and Oversight Plan
 - C2 – Deliverable Expectation Document
- D. Operating Expectations
- E. Future Scope Description
- F. General Terms and Conditions
 - F1 – Incident and Problem Management

- F2 – Insurance Requirements
- F3 – Security and Data Protection Controls
- F4 – Service Level Agreement
- G. Bidder’s Information, Declarations and Certifications
- H. Bidder’s Questionnaire
 - H1 – Company References
 - H2 – Key Personnel and Subcontractor References
- I. Fee Proposal Instructions
 - I1 – Fee Proposal Workbook
- J. User Stories and Non-Functional Requirements
- K. Joint Resource Plan
- L. Inclusion Plan Template
- M. Agency Policies