

STATE OF WASHINGTON
OFFICE OF THE SECRETARY OF STATE
CORPORATIONS & CHARITIES DIVISION

RFP 23-09 – NONPROFIT CORPORATIONS & CHARITIES TRAINING PROGRAM

AMENDMENT NO. 1

(June 23, 2023)

SUMMARY

This Amendment No. 1 to RFP 23-09 compiles the questions received from vendors via email and during the preproposal conference held on June 14, 2023, and provides answers to each of the vendors' questions.

PREPROPOSAL CONFERENCE Q&As

Q: What is the amount of funding available for this procurement?

A: Up to \$550,000.00. OSOS is seeking the best value consistent with conserving taxpayer resources, but cost is not the only or most important factor considered.

Q: In section 1.1 of the RFP, what does the term "comprehensive" mean with reference to the training program sought?

A: A "comprehensive" training program will include but is not limited to instruction on the following subjects: Internal governance, fiduciary duties, compliance with state agency rules and requirements, include reporting requirements to the Attorney General's Office.

Q: Can the training take place via courses and recordings or must it be a live trainer?

A: It is up to the submitter whether their proposal includes live trainings, courses and/or recordings, or a mix of all or several of these approaches.

Q: It sounds as if the training program is primarily focused on nonprofit and charitable organization compliance with applicable laws, rules and requirements, rather than on the more general management of nonprofit and charitable organizations?

A: Compliance should be a component of the proposed training program, but OSOS is also interested in proposed curricula providing instruction on topics related to the management of these organizations.

Q: In which languages should the training program be offered, and what are you looking for in terms of diversity of outreach?

A: This will be at the discretion of the submitter within its proposal. Vendor proposals and the training program curricula should be structured in such a way, and include such approaches, tools and information, as to effectively serve the broadest possible reach of diverse communities throughout the state of Washington. OSOS is in the process of identifying and evaluating opportunities for a deeper outreach to historically marginalized communities and organizations that are underserved by traditional methods of education, and to organizations experiencing challenges as they grow in size and complexity.

Q: Can nonprofits respond to this RFP?

A: Yes

Q: Are you looking to award the contract to just one vendor or are you awarding multiple contracts to different vendors for various components of the training program?

A: The RFP is designed to make a contract award based on a single proposal. If a vendor only responds to a portion of the requested services in its proposal it is unlikely to be considered responsive.

Q: Would collaborative approaches between different organizations be considered, if it was framed under one proposal?

A: Yes. Multiple vendors could conceivably collaborate on a submitted proposal with an identified lead vendor. A vendor may also utilize subcontractors to perform any number of services or components of the training program as part of its proposal.

Q: How does OSOS leadership hope the nonprofit training program will evolve?

A: To best serve the nonprofit community in the state of Washington, OSOS leadership believes that the nonprofit training program will constantly evolve over time. It must continuously explore and develop effective ways to meet people where they are.

Q: If we included online learning modules in our proposal what would the maintenance and management of those modules look like after the contract is completed?

A: OSOS will own the materials and modules created for this training program under any contract resulting from this RFP. Decisions regarding how those materials and modules will be managed and/or maintained following the completion of any awarded contract will be made in the sole discretion of OSOS, and may be based on any number of factors, including without limitation an assessment of their ongoing usefulness to the training program and the resources available and/or necessary to manage and maintain them.

Q: Is OSOS looking for the proposed training program to provide information and tools to nonprofits and charities that will enable them to identify and seek out resources they may need in the successful conduct of their operations, or is the provision of direct resources contemplated as a component of the training program?

A: Professional and technical resources are a recognized need and a common request from nonprofits and charities. OSOS will consider ideas for providing direct technical support as part of the submitted proposal. Vendors that include the provision of direct technical support in their proposals should also include the associated budget for this component in their cost proposal.

Q: What is the training program's primary purpose and who is its target audience? Is it designed for newly organized or emerging nonprofits and their leaders who are in need of basic compliance training, or is it designed to serve the broader nonprofit community, both new and established nonprofits and their boards, executive directors and staff, through education and training on developments in the nonprofit space, including changes in nonprofit laws, requirements, and best practices?

A: All of the above. The training program should effectively serve both newly formed and established nonprofits and their personnel through a curriculum that includes education and information on the structure, operation and requirements of nonprofits at levels that will be of benefit and value to both newly formed and established nonprofit organizations, and that also provides coverage of recent developments, changes and conversations happening in the nonprofit space. The training program should address the needs of nonprofits to understand the regulatory framework that they operate in, providing the appropriate tools and instruction for them to navigate and operate in that framework successfully, including updates and changes in laws, rules, practices, and approaches.

ALL OTHER Q&As

(organized by category)

OBJECTIVES AND SCOPE:

Q: What are the specific goals and objectives of the training program?

A: To provide a comprehensive education resource for the nonprofit and charitable communities. "Comprehensive" includes but is not limited to internal governance, fiduciary duties, and compliance with state agencies, including reporting requirements to the Attorney General's Office.

Q: What is the desired outcome in terms of increasing nonprofit registration and elevating their practices?

A: Expand better internal governance for nonprofits and provide education on the possible requirement to register with the charities program.

Q: Was a similar training program carried out in the past or is this a completely new initiative?

A: The current training program contract is held by Nonprofit Association of Washington.

Q: Are there any specific target regions or demographics for the training?

A: There is not a specific target outside of it being Washington State nonprofits and charities.

TARGET AUDIENCE:

Q: Who is the intended audience for the training? Are there any specific criteria or qualifications?

A: Washington State nonprofits and charities. To attend trainings, there are not specific criteria or qualifications.

Q: How many participants are expected to be part of the training program?

A: There are currently roughly 56,500 registered nonprofit corporations and 12,000 registered charities (98% of which are nonprofit corporation). The number attending trainings is fluid.

Q: Are there any language or accessibility requirements for the training?

A: Not currently, though OSOS encourages training programs that are designed to eliminate barriers to participation for all communities.

Q: Who and how will an invitation to training be communicated to the intended audience?

A: This will be at the discretion of the submitter within their proposal.

TRAINING CONTENT AND FORMAT:

Q: What are the key topics or areas of focus that the training program should focus on?

A: These include but are not limited to internal governance, fiduciary duties, and compliance with state and federal agencies, including reporting requirements to the Attorney General's Office.

Q: Are there any specific methodologies, tools, or resources that should be included?

A: This will be at the discretion of the submitter within their proposal.

Q: What is the total number of training sessions (in-person vs. virtual)?

A: This will be at the discretion of the submitter within their proposal.

Q: What is the expected duration and frequency of training sessions?

A: This will be at the discretion of the submitter within their proposal.

DELIVERY LOGISTICS:

Q: Are there specific dates or timelines for delivering the training?

A: The period of performance for this RFP is tentatively scheduled to begin on 7/24/2023 and to end no later than 6/30/2024.

Q: What is the preferred location(s) for in-person training?

A: This will be at the discretion of the submitter within their proposal.

Q: Are there any technical requirements or equipment needed for the training delivery?

A: This will be at the discretion of the submitter within their proposal.

EVALUATION AND REPORTING:

Q: How will the success or effectiveness of the training program be measured and evaluated?

A: Evaluation metrics can be included with the proposal, but specific benchmarks and evaluation criteria will be negotiated in the final contract with the successful bidder.

Q: Are there any reporting or documentation requirements for the training sessions?

A: Quarterly invoices generally are accompanied by a breakdown of the deliverables completed, including training sessions. That breakdown should include dates, locations, theme of the training, and number of attendees.

Q: Are there any expectations for post-training support or follow-up activities?

A: During the term of the contract, the proposal may include follow-up support for trainees, but there are no specific requirements for that at this time.

Q: How will existing vendors (who have worked on a state-wide contract) and new/first-time vendors be evaluated for equal opportunity?

A: The same criteria will be used to evaluate all proposals, including thoroughness of the training plans, scope of reach of the organization to communities across the state, and contractor experience. That experience needn't be with OSOS, and prior experience with OSOS will not be given greater weight in evaluating the proposals than other relevant contractor experience.

FUNDING:

Q: Are there any restrictions or guidelines regarding the use of funds?

A: The enabling statutes that guide use of these funds are RCW 19.09.510 and .530: "[D]evelop and operate an education program for charitable organizations, their board members, and the general public." There is wide latitude in use of these funds to meet this goal, but all use of

state funds are governed by the rules from the Office of Financial Management's State Administrative & Accounting Manual: <https://ofm.wa.gov/accounting/saam>

Q: Are there specific requirements for the cost breakdown?

A: While there are not specific requirements, the more detail within a proposal regarding specific use of the available funds, the more thoroughly we can evaluate the proposal.

PROPOSAL SUBMISSION:

Q: Are there any specific guidelines or templates for the proposal format?

A: The proposals should be organized to incorporate the bullet points in Section 3 of the RFP: Letter of Submittal, Technical Proposal, Management Proposal, and Cost Proposal. The proposals need not be limited to these bullet points, and may include additional bullet points or information relevant to the training proposal and the vendor's experience.