

RFP 17-07 VENDOR QUESTIONS WITH RESPONSES

Q1. What do you mean by "organic record"? Do you mean "organization record"?

A1. The "organic record" means the original formation document filed with OSOS.

Q2. Under training criteria, can you clarify the number of trainings that have to be in each category?

A2. The stated training percentages are minimums based on the total number of trainings for the fiscal year. OSOS is not mandating a specific number of trainings per category.

Q3. What if we do 10 webinars, so 35 trainings? 50% will not be in-person. Do you mean 50% of the base of 30, so at least 15? If 15 are in-person and 5 are webinars, what should the remaining 10 be? Is it open for us to propose?

A3. Consultants should propose a way to meet the stated requirements. A minimum of 50% of the total number of trainings each fiscal year must be in-person. A minimum of 15% of the total number of trainings each fiscal year must be full-day trainings. A minimum of 15% of the total number of trainings each fiscal year must be webinars. A minimum of 20% of the total number of trainings each fiscal year must be workshops lasting at least a half-day.

Q4. If 50% of the total training per year is to be "in-person," how do we allocate the other 50%? We understand that 15% of the remote training is by webinar, but that only equates to 65%. There is another 35% missing in the distribution. Are these percentages minimums or hard numbers?

A4. The stated training percentages are minimums based on the total number of trainings for the fiscal year.

Q5. From the 50% in-person training we know that 20% is 1/2 day and 15% is full-day courses. Again, that only equates to 35% of the in-person training. Does the 50% represent the number of total trainings vs. the training length? I.e. there are 30 trainings in the first year, and 45 in year two. 50% of the trainings offered in both years must be in-person regardless of whether they are full-day or 1/2 day. Is that the case?

A5. The stated training percentages are minimums based on the total number of trainings for the fiscal year.

Q6. Is it up to the consultant(s) to determine which courses are webinars, full-day, and/or 1/2 day, or is there a preference?

A6. Consultants should propose a way to meet the stated training requirements.

Q7. Are state facilities available to reserve for in-person classes or must the consultant(s) rent space in local communities?

A7. The Contractor will be responsible for planning and organizing trainings at their expense, including locating and procuring venues.

Q8. Will state facilities / copiers be available for making copies of participant handouts and/or workbooks, or will this be an expense line-item for the consultant(s)?

A8. The Contractor will be responsible for preparing and printing materials at their expense.

Q9. Are the surveys mentioned in the RFP independently canvassed before classes are held, or may data be gathered as part of the registrations and evaluation process?

A9. The expectation is that the Contractor will provide all attendees a post-training survey/questionnaire to obtain feedback.

Q10. If the consultant(s) create video trainings, how will they be monitored and/or tracked for participation? Is this tracking necessary, and would it count toward the minimum 75 trainings?

A10. It is unclear how the Consultant would utilize video trainings. OSOS expects the 75 trainings, including webinars, to be presented live.

Q11. Is there a state registry of non-profit corporations and charities - by county - that would be available to the consultant(s) in order to identify potential participants and survey targets?

A11. OSOS does not maintain a geography-based list of charities or corporations. OSOS will work with the Contractor to provide categorized information, if necessary.

Q12. Will the classes be required or voluntary only?

A12. All classes will be voluntary for participants.

Q13. Outside of the SoS website, what other marketing platforms and venues are there? How do we access them?

A13. The Contractor will be responsible for locating venues and providing additional marketing tools.

Q14. If many of the charity organizations [in] our state have mis-classified themselves, how are you defining the differences between a non-profit corporation and a charity that we might make clear these differences in the training components?

A14. The Contractor will need to have a clear understanding of the legal nuances regarding non-profit and charity classifications, and be able to provide appropriate training.

Q15. What would you consider to be the biggest knowledge gap between the 6 topics? (i.e. what do people understand the least?)

A15. The area that may be least understood involves nonprofit corporation, charitable organization, and tax-exempt organization differences.

Q16. What is your vision of success beyond the numbers?

A16. OSOS is looking for a Contractor to provide quality trainings to as many nonprofit, charitable organizations across the state as practicable, especially in remote rural areas.

Q17. What organization has been delivering these services this past fiscal year?

A17. The current vendor is Washington Nonprofits.

Q18. What methods did [the current vendor] use to deliver the training?

A18. The current vendor has utilized a variety of tools, including webinars, workshops, and conference calls.

Q19. How would [you] describe [the current vendor's] performance in terms of meeting your objectives and desired outcomes?

A19. The current RFP has been implemented due to an impending expiration. The existence of the RFP is not to be used as an evaluation or assessment of any current or former vendor.

Q20. What cities are the on-site trainings required in?

A20. There is no requirement to offer trainings in any specific city, but trainings should be offered throughout Washington State, including rural areas.

Q21. How many total trainings are expected of the vendor in a 2-year period?

A21. A minimum of 30 trainings must be completed by June 30, 2018, and a minimum of 45 trainings must be completed between July 1, 2018 and June 30, 2019.

Q22. How are the trainees informed about the training opportunity?

A22. OSOS will work with the Contractor to post training opportunities on the Charities training website. Otherwise, the Contractor will be responsible for notifications.

Q23. Are the percentages of in-person, half-day, and webinar requirements minimums or maximum percentages?

A23. The stated training percentages are minimums based on the total number of trainings for the fiscal year.

Q24. What methods are acceptable training techniques: Web-based self-study? Blend of instructor-led and web-based?

A24. Self-study is not preferred. You may visit our training page at <https://www.sos.wa.gov/charities/training/> to see examples of trainings provided.

Q25. Are there training materials already developed for these trainings? Can they be shared with the vendor who is awarded the next contract?

A25. The Contractor will be responsible for developing the training materials. The expectation is that materials produced pursuant to the contract will become the property of OSOS.

Q26. Who are the trainees? What are their backgrounds?

A26. The trainees may come from a wide variety of backgrounds, and include individuals considering starting a nonprofit or charitable organization as well as those who have experience and want to improve in one or more areas.

Q27. How many trainees do you expect us to train per year?

A27. The training requirements focus on the type and geographical criteria, rather than the number of trainees.

Q28. The sample under section 8 Copyright Provisions states that “...all Materials produced under the Contract shall be considered “works for hire..” Is this a non-negotiable element of the contract. Would it be acceptable for this provision to be changed to a licensing arrangement related to Materials developed?

A28. The expectation is that all materials produced under the contract will be owned by OSOS.

Q29. Would the Contractor be required to develop and maintain the recipient list for advertising the training?

A29. OSOS will work with the Contractor to post training opportunities on the Charities training website. OSOS also maintains mailing addresses for nonprofit and charitable organizations that the Contractor may use to advertise the trainings. Otherwise, the Contractor will be responsible for promotions and notifications. The Contractor will be expected to maintain records regarding training notifications, and provide records to OSOS upon request.

Q30. Can you add clarity on the requested topics and scope the training program? For instance there are 50% of the trainings are in-person trainings does this include the 20% half-day workshops and the 15% all day trainings? Or do the half day workshops also overlap with the 15% webinars? For example for trainings to be completed by June 30, 2018 is it expected to have a minimum the following?

- 5 all day trainings
- 6 half-day workshops
- 5 webinars
- 4 other types of in-person trainings.

A30. The stated training percentages are minimums based on the total number of trainings for the fiscal year.

Q31. When considering the 30 trainings to be completed by June 30, 2018 what is the minimum and maximum amount of time for a single training?

- a. What is the minimum amount of time for an in-person training?
- b. What is the minimum amount of time for a webinar?
- c. What is the maximum amount of time for an in-person training (may it be a workshop that covers more than a single day?)
- d. What is the maximum amount of time for a webinar?

A31. Other than the stated requirements, there are no minimum or maximum lengths for any specific training events. Consultants should propose a way to meet the stated training requirements.

Q32. Is it acceptable for the Contractor to create an online option (simulcast) for an in-person training?

A32. Consultants may propose any approach to meet the identified requirements.

Q33. It is acceptable to provide taped content or webinars that may be accessed at the participants convenience? These may include self-study questions to verify the participant has fully covered the material?

A33. OSOS expects the 75 trainings, including webinars, to be presented live. Consultants may propose any approach to meet the identified requirements.

Q34. Will written self-study materials be expected to be developed or provided by the Contractor?

A34. OSOS expects the 75 trainings, including webinars, to be presented live. Self-study is not a preferred alternative.

Q35. For webinars, will it be expected to create a mechanism for participants to answer verification questions to prove they have fully been engaged in the learning process?

A35. Consultants may propose any approach to meet the identified requirements. Consultants should have a way to monitor attendance, and be able to follow up with a participant survey.

Q36. What is the anticipated number of trainings outside the Greater Puget Sound to be completed by June 30, 2018?

A36. OSOS is looking for a Contractor to provide quality trainings to as many nonprofit, charitable organizations across the state as practicable, especially in remote and rural areas. There is no set minimum requirement for the number of trainings outside the Greater Puget Sound. Consultants may propose any approach to meet the identified requirements.

Q37. Would OSOS collaborate with the Contractor to develop the training program schedule of topics to be covered?

A37. The Contractor will be responsible for planning the training program using the curriculum topics identified in the RFP. Proposals should show that Consultant can meet identified requirements with limited access to OSOS resources.

Q38. On the proposed topics provided, attendees could receive Certified Educational (CE) credits such as CPE and CLE. Will the Contractor be expected to provide the CE credits, including the administration of those credits?

A38. Certified Educational credit offerings have not been identified as a priority for OSOS, but Consultants may propose any approach to meet the identified requirements.

Q39. Will the Contractor be expected to provide access to the webinar technology for participants to use?

A39. Yes, the Contractor will be expected to provide access to the webinar technology for participants to use.

Q40. We assume that the proposed curriculum topics provided may be a standalone class or all or some of the topics will be combined into a training event. Is that a correct assumption?

A40. Consultants may propose any approach to meet the identified requirements.

Q41. Will the State pay for out of pocket cost related to conducting the training such as travel and other costs or should that be built into our fee quote?

A41. Consultants should consider all expenses when preparing a Proposal. The Contractor will be responsible for travel and other expenses incurred in fulfilling its duties.

Q42. Is there any existing training materials or guides that the State has that they want or will allow the Contractor to incorporate into the training curriculum?

A42. OSOS does not have any specific training material that the Contractor will be required to utilize.

Q43. Exhibit C under training criteria differentiates between “in-person trainings,” “workshops,” and full-day trainings.” Is the difference in that the in-person will be with individual entities and the workshops and full-day trainings will be with groups of non-profits?

A43. No. The stated training percentages are minimums based on the total number of trainings for the fiscal year.

Q44. Will the contractor be required to seek out attendees or will this be promoted through the Secretary of State?

A44. OSOS will work with the Contractor to post training opportunities on the Charities training website. OSOS also maintains mailing addresses for nonprofit and charitable organizations that Contractor may use to advertise the trainings. Otherwise, the Contractor will be responsible for promotions and notifications.

Q45. The RFPP is requiring that trainings be made available to the OSOS training pages website. Will this development be collaborative, or will OSOS be developing the web page and simply be inserting content created by the contractor? What formats will the OSOS be able to support on its website? Are there further restrictions as to format for both security and cost of development?

A45. The Contractor will be responsible for developing content, at their expense. OSOS maintains a Charities training website that will provide links to the Contractor’s training information. OSOS may also insert Contractor-developed content on the website. Word or PDF documents are usually acceptable formats for inclusion on the OSOS website, and other formats may be allowed. OSOS will review content and security of items before posting. You may view examples of posted information at the following site: <https://www.sos.wa.gov/charities/training/>