

ADDENDUM NUMBER (No.) 2

 <p>Community Colleges of Spokane</p> <p>Purchasing Department</p> <p>Address: 501 N. Riverpoint Blvd, Suite 226 Spokane, WA 99202</p>	<p>Request for Proposals (RFP)</p> <p>Competitive Solicitation - Not an Order</p> <p>Project No.: 2019-RFP-PS-0020</p> <p>Title: Strategic Plan Facilitation</p> <p>RFP Issue Date: 01/06/2020</p> <p>PR No.: TBD</p>
<p>For Questions, reference the Project No. above and contact:</p> <p>Bela Kovacs, CPPO, C.P.M., CMRP Purchasing Manager</p> <p>Phone: (509) 434-5325 Email: bela.kovacs@ccs.spokane.edu</p>	<p>RESPONSE DEADLINE¹</p> <p>NOTE: To be considered, responses to this competitive solicitation must be delivered to the address listed above by <u>no later</u> than the appointed date and time listed below:</p> <p>DATE DUE (on, or before): 01/31/2020¹</p> <p>TIME DUE (on, or before): 12:00:00¹ (noon), PST</p>

Date of this Addendum No 1: **January 21, 2020**

The additions, omissions, clarifications and corrections contained herein shall be made to applicable specifications and shall be included by respondents in responses submitted. References made below to specifications shall be used as a general guide only. Respondents shall determine what is affected by the Addendum items listed herein and must acknowledge receipt of this addendum in the Addenda Acknowledgement Section of the RFP document.

Addendum Item 1: It has come to the attention of CCS that an incomplete distribution may have inadvertently occurred on the Initial Notification for this RFP that was issued by the CCS Office of Strategy and Administrative Services. Therefore, in the interest of ensuring consistency in the competitive solicitation process, a copy of the same Initial Notification as set forth in Attachment A to this Addendum No. 2, is formally issued as an addendum to this RFP. Additionally, a clerical error was made on Addendum No. 1 for the Time Due and this Addendum No. 2 makes correction to the Time Due for the submittals. The correct Time Due is: **12:00:00 (noon), PST**.

Addendum Item 2: It has become apparent that the answers to many of the questions being asked about this RFP are either redundant or can be found by a thorough review of the RFP document or which has otherwise been answered in an addenda. CCS appreciates the interest and is happy to respond to questions that have not already been addressed in the RFP or addenda; however, due to limited resources, interested respondents are encouraged to first carefully and thoroughly review the entirety of the RFP including any and all addenda that have been issued. Your interest in this project is appreciated.

¹ Responses delivered after the Response Deadline listed above, may be rejected by CCS as non-responsive. CCS, its agents, employees and officers assume no responsibility whatsoever for any delay in U.S. Mail, CCS internal Mail Services, or any other mail service or carrier, resulting in a response being delivered after the Response Deadline. It is the responsibility of the respondent to ensure that their response is delivered to the CCS Purchasing Department by the Response Deadline.

Addendum Item 3: The RFP is hereby amended in the Section concerning "Access To Data" on page 4 of the RFP document. The reference RCW 39.29.080 is struck and replaced by a reference to RCW 39.26.180. All other portions of the paragraph otherwise remain the same and the revised first sentence of the paragraph, after this amendment is made, shall now reads as follows:

"ACCESS TO DATA - In compliance with RCW 39.26.180, the Contractor shall provide access to data generated under this contract to CCS, the Joint Legislative Audit and Review Committee, and the state auditor at no additional cost."

Addendum Item 4: The following miscellaneous questions received and the related CCS responses to these questions as set forth below are issued as a part of this Addendum No. 2.

- 4.1 **QUESTION:** On page 5 of the RFP, it states: "In gathering and analyzing demographic and other data, the CONSULTANT will be expected to rely on and take advantage of already available resources in order to gather the best and most reliable information while minimizing costs and avoiding duplication of effort and cost. CCS assumes that these and other taxpayer-supported offices or agencies will provide their data at no cost to the CONSULTANT for the benefit of CCS, but CCS does not control these offices or agencies and cannot guarantee their cooperation.

If this undefined data/information should prove critical to the Strategic Plan, but is only available to the CONSULTANT at a cost, as yet undetermined, will CCS allow this as a separately reimbursable item to the CONTRACTOR? Should these unidentified agencies choose not to cooperate with requests from the CONTRACTOR, will CCS release the CONTRACTOR from any responsibility for failure to obtain this data?

CCS RESPONSE: Yes to both questions. We would work with to contractor to first have CCS make the purchase directly.

- 4.2 **QUESTION:** On page 7 of the RFP, there is an exemption criteria identified as Chapter 42.56 RCW.

There are approximately 80 sub-chapters defined under Chapter 42.56 RCW. Can you provide clarity/qualification of the applicable sub-chapter for acceptable exemptions to disclosure of RFP proposals?

CCS RESPONSE: This question constitutes a request for legal advice/guidance regarding the potential applicability of the Public Records Act. The Community College of Spokane cannot provide such legal advice/guidance.

- 4.3 **QUESTION:** On page 19 of the RFP, it states: "Payment shall be considered timely if made by CCS within thirty (30) days after receipt of properly completed invoices. Payment shall be sent to the address designated by the CONTRACTOR"

What are the terms for payments not made by CCS to the CONTRACTOR in a "timely" manner? Is there a potential for ACH or other electronic payment methods to the CONTRACTOR? What are the remedies/terms for payments not received due to no fault of CONTRACTOR or CCS, i.e. payments lost in the mail?

CCS RESPONSE: CCS always endeavors to pay contractual obligations within 30 days as prescribed by State law RCW 39.76.10. Any remedies or other terms of payment must be negotiated in the final contract. ACH is a payment option CCS can provide upon receipt of all required banking information by the vendor.

- 4.4 **QUESTION:** On page 19 of the RFP, it states: "CCS may, in its sole discretion, terminate the contract or withhold payments claimed by the CONTRACTOR for services rendered if the CONTRACTOR fails to satisfactorily comply with any term or condition of this contract. On page 26 of the RFP, it states, "TERMINATION FOR CAUSE – In the event CCS determines the Contractor has failed to comply with the conditions of this Contract in a timely manner.

Please clarify the difference between "satisfactorily comply" and "failed to comply with the condition of this Contract in a timely manner" and what the meaning is for "satisfactorily" and "timely".?

CCS RESPONSE: Satisfactorily comply means that the CONTRACTOR complies with the terms of the RFP, including any agreed upon timeline for work to be completed. Timely means that the CONTRACTOR works consistently towards completing the scope of work laid out in the RFP starting on or about March 1, 2020 so that the project can be completed by July 2020.

- 4.5 **QUESTION:** On page 21 of the RFP, it states, " Contractor agrees to make personal information covered under this agreement available to CCS for inspection or to amend the personal information. Contractor shall, as directed by CCS, incorporate any amendments to the personal information into all copies of such personal information maintained by the Contractor or its subcontractors.

What is the meaning of "personal information"?

CCS RESPONSE: Personal Information is defined in Exhibit A of the General Terms and Conditions under the definitions section. See page 1 of Exhibit A in the RFP.

- 4.6 **QUESTION:** On page 24 of the RFP, it states, "The Contractor shall make available information necessary for CCS to comply with the client's right to access, amend, and receive an accounting of disclosures of their Personal Information according to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) or any regulations enacted or revised pursuant to the HIPAA provisions and applicable provisions of Washington State law.

Who is the "client"? The Health Insurance Portability and Accountability Act of 1996 (HIPAA) is the governing and regulatory body of standards that protect patient medical records and other health information. Again, what is the meaning of "Personal Information"? How are CONTRACTOR medical records and other health information pertinent to this RFP for a Strategic Plan?

CCS RESPONSE: Personal Information is defined in the RFP in Exhibit A of the General Terms and Conditions (see page 1 of Exhibit A). In the "Right of Inspection" section on page labeled "7 of 9" in the RFP, the word "client" is struck and replaced with the words "student/employee..." however, because the requisitioning CCS department anticipates that no HIPAA information is anticipated for exchange, therefore, the "Right of Inspection" section is hereby struck from the RFP.

- 4.7 **QUESTION:** If a firm is chosen to interview, is there any flexibility for scheduling the interviews to occur at any date later than indicated in the estimated project schedule in section 2.2 of the RFP?

CCS RESPONSE: The time frames for the project are identified in the RFP. Time is of the essence to CCS in the interests of completing the project. Each consultant will need to assess their own schedule of availability as they determine for themselves whether (or not) they will submit a proposal to the RFP. The deadline for the finished product of this RFP is a matter that is mandated by statute and the Board of trustees. While the proposed schedule in the RFP is considered to be a firm date and it is the expectation of CCS that the targeted schedule be accomplished; the RFP schedule is "tentative" only in the sense that if CCS determines for itself that it has a need to adjust the schedule, then CCS will consider doing so. CCS encourages all interested consultants to submit proposals to the RFP because it

is only through the participation in the competitive process by highly qualified consultants, can CCS accomplish its important strategic mission in a cost-effective manner.

4.8 **QUESTION:** Will the strategic plan be required to have separate sections identifying the responses to the list of objectives in the Scope of Work for both colleges, along with an overall CCS strategic plan?

CCS RESPONSE: No. This is a CCS plan to which both of our colleges will be part.

4.9 **QUESTION:** What is the anticipated number of units/departments that will be critical to the strategic planning process? How deep into the CCS organizational structure should the contractor engage?

CCS RESPONSE: This is a CCS-wide plan to which all CCS departments will be stakeholders and part of it's development.

4.10 **QUESTION:** Scoring: Section 4.3 Evaluation Weighting and Scoring does not include point allocations or mandatory/scored designations for the Technical Proposal sections "D. Outcomes and Performance Measurement" or "E. Risks." Will these 2 sections of proposals be scored?

CCS RESPONSE: Elements expected to be part of the Technical proposal are outlined in 3.2 and will be considered in scoring the quality of the work plan.

4.11 **QUESTION:** In my business I routinely work with freelance workers from a commercial service for administrative tasks such as transcription or copyediting, but for none of my professional services. Is this acceptable without specifying the individual providers as subcontractors?

CCS RESPONSE: For reasons outlined in Section 3.0, the RFP requires that proposers must provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. A commercial service would be considered a subcontractor.

4.12 **QUESTION:** In RFP section 1.4, CCS reserves the right to extend the contract for up to a year. Under what conditions does CCS expect a contract extension, and what would such an extension include?

CCS RESPONSE: Any condition that, in the judgement of CCS, would necessitate an extension of the contract.

4.13 **QUESTION:** Will the consultant have access to the full 2011-2021 Strategic Plan?

CCS RESPONSE: To the extent files remain available/exist, yes. Record retention procedures may have terminated some records.

4.14 **QUESTION:** Do you anticipate stakeholder meetings (internal and/or external) to occur at any of SCC's or SFCC's rural locations or catchment area (counties)? If so, will travel expenses be reimbursable or need to be included as part of the proposal?

CCS RESPONSE: Rural location meetings to be determined. Note section 3.4 regarding "Identification of Costs" and requirement to identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the contract.

4.15 **QUESTION:** For any and/or all Planning Team and Internal and/or External Stakeholders meetings and discussions are light refreshments (e.g. coffee, water, cookies, etc.) anticipated? If so, will that be a reimbursable expense, need to be included in the proposal or will it be a CCS expense?

CCS RESPONSE: None are anticipated at this time.

4.16 **QUESTION:** How may printed copies of documents (in addition to the master documents) produced by the consultant will be required at the consultant's expense (realizing the focus is on electronic documents)?

CCS RESPONSE: Per Section 1.2, 10-c, the consultant is responsible for preparing a final report to be delivered to the CHIEF STRATEGY OFFICER. CCS has not delineated a preference either way for the final report whether it be electronic or hard copy nor for any specific formatting or binding if the successful consultant provides the final report by hard copy.

4.17 **QUESTION:** What is the expectation for how often the consultant needs to work onsite?

CCS RESPONSE: All planning team meetings and as determined necessary by the Chief Strategy Officer.

4.18 **QUESTION:** Do you have a desired budget in mind?

CCS RESPONSE: See the response to the question(s) about budget as addressed in Addendum No. 1.

4.19 **QUESTION:** Can you describe what you hope to achieve from this process? Is there a particular problem or issue to solve? What does success look like in your eyes?

CCS RESPONSE: See Scope of work in Section 1.2.

4.20 **QUESTION:** What kind of review process do you envision? Are their particulars you have in mind? Who are your core reviewers and decision-makers? Will there be rounds of review with other stakeholders and who might they be? How many rounds of review of deliverables is desirable? Will you have a coordinator on your end to gather and organize feedback as there are numerous stakeholders?

CCS RESPONSE: It is unclear with the requestor intends to mean by the word "review" in the first question of 4.20, above. CCS has attempted to seek clarification of, however, the response remains vague. If however, the requestor intent of the word "review" means "approval of their product/deliverable, then CCS's response is that final report and recommendations will be presented to CCS' executive leadership for review and action. As to who the core reviewers are, see the preceding sentence. However, if the requestor is asking about the RFP proposal evaluation team, then see the response to the question(s) about the CCS project team as addressed in Addendum No. 1. At this time, it is anticipated that there will there be NO rounds of review with other stakeholders., therefore, no number of rounds specified. As to whether there will be a CCS coordinator to gather and organize feedback, see RFP Section 1.2. **REMINDER:** During the competitive proposal solicitation process, any respondent that contacts any CCS personnel contact other than the CCS designated RFP Coordinator, may at the sole discretion of CCS, be disqualified and their response rejected as non-responsive.

4.21 **QUESTION:** Who do you envision to be on the core planning team? How many people? What other types of stakeholders will be involved and how many of each group might you expect from Faculty, staff, administrators, students?

CCS RESPONSE: See the response to the question(s) about the CCS project team as addressed in Addendum No. 1.

4.22 **QUESTION:** How will the two colleges work together in this plan? is there a key representative from each?

CCS RESPONSE: This is a district plan and applies to both of the district's colleges. College representatives, along with district office representatives, will participate on the planning team.

- 4.23 **QUESTION:** How do you envision holding meetings? In person, via Skype or video, both? At one campus or the other?
- CCS RESPONSE:** In person. Locations to be determined.
- 4.24 **QUESTION:** Can we see your current plan? (unless they sent?) Your current mission and vision statements?
- CCS RESPONSE:** See the response to the question(s) about CCS's current Strategic Plan as addressed in Addendum No. 1.
- 4.25 **QUESTION:** What is the expectation for how often the consultant needs to work onsite?
- CCS RESPONSE:** All planning team meetings and as determined necessary by the Chief Strategy Officer.
- 4.26 **QUESTION:** Regarding Section 1.1 of the RFP (on page 3): You state in the RFP your desire for the consultant to not duplicate the services provided by CSS staff. Can you describe the capacity and capabilities of the Chief Strategy Officer's team for organizational strategy and how they see the division of roles and responsibilities between the CSS team and the consultant?
- CCS RESPONSE:** To be determined. See section 1.2 for scope of work.
- 4.27 **QUESTION:** Regarding Section 1.2, Item 7 of the RFP (on page 4): Is it your expectation that the consultant would have primary responsibility for designing and conducting the competitive market analysis? In other words, is the consultant expected to produce and analyze the data associated with this task, or is the Chief Strategy Officer's team providing the data to the consultant to analyze and draw conclusions? Can you clarify the consultant role and responsibility related to this section?
- CCS RESPONSE:** See also Section 1.2, number 3. Item 7 requires the consultant facilitate the planning team's analysis, review and discussion of documentation, data, analysis and assessments. It is not our expectation that the consultant is primarily responsible for developing those documents, data, analysis and assessments.
- 4.28 **QUESTION:** Regarding Section 1.2, Item 10.a of the RFP (on page 4): Does the report include the actual final Strategic Plan document itself, or will the Chief Strategy Officer's team be writing the Strategic Plan document based on the findings and recommendations identified in the consultant's final report?
- CCS RESPONSE:** Per Section 1.2, the consultant facilitates the planning team in determining and recommending CCS' strategic priorities and preparing a report (see Section 1.2, sub section 8) inclusive of those recommendations.
- 4.29 **QUESTION:** Regarding Section 1.2, Item 11 of the RFP (on page 4): Please provide an estimate of the number of stakeholder groups, meetings, and community events the consultant would be expected to support and attend.
- CCS RESPONSE:** Per section 1.2, sub section 2, the consultant will assist CCS make these decisions.
- 4.30 **QUESTION:** Regarding Section 1.2, Item 12 of the RFP (on page 4): Can you give us some examples of what would be considered "other services requested by CCS' Chief Strategy Officer"?
- CCS RESPONSE:** As determined necessary to complete the scope of work outlined in section 1.2.
- 4.31 **QUESTION:** Regarding Section 3.3, Item B.3 of the RFP (on page 12): The RFP instructs us to provide a list of relevant contracts from the last five years. We are happy to provide the contract number and

period of performance. However, since we also need to provide reference contact information separately in Section 3.3, Item D of the RFP, will CCS consider eliminating the requirement to provide contact persons, telephone numbers, and fax numbers/email addresses as part of our response to Section 3.3, Item B.3? We respect our clients' privacy, and as much as possible, we refrain from providing their contact information in documents that may become publicly available.

CCS RESPONSE: CCS will not eliminate the requirement for contact information for past contracts as requested in section 3.3 Item B.3.

4.32 **QUESTION:** Regarding Section 3.3, Item D of the RFP (on page 12): It is our understanding that in addition to providing three references for our firm, we also need to provide three references for our proposed project manager (as the "lead staff person"). Is this correct, or do we need to provide references for all of our proposed core project team members?

CCS RESPONSE: These sections are scored and are not being waived.

4.33 **QUESTION:** Is there a district office location separate from either of the College campuses?

CCS RESPONSE: Yes.

4.34 **QUESTION:** What is the District Office location?

CCS RESPONSE: The District Business Office location (mailing address) is:

501 N. Riverpoint Blvd, Spokane, Washington 99202

REMINDER: *During the competitive proposal solicitation process, any respondent that contacts any CCS personnel contact other than the CCS designated RFP Coordinator, may at the sole discretion of CCS, be disqualified and their response rejected as non-responsive.*

4.35 **QUESTION:** How many administrators/staff are located here?

CCS RESPONSE: Approximately 100.

4.36 **QUESTION:** We were able to find a summary of the latest Strategic Plan on the CSS website. Can you share a copy of the full plan with bidders?

CCS RESPONSE: No.

4.37 **QUESTION:** While there are over 1,700 stakeholders across the district, and various methods for engaging with stakeholders, what is CCS' expectation as it relates to the number of stakeholders we meet in person for interviews and/or focus groups?

CCS RESPONSE: See Section 1.2, sub-section 2. To be determined.

4.38 **QUESTION:** Regarding question and answer 3.5 in Addendum 1: Given the amount of information requested in Section 3.0 of the RFP (Proposal Contents), can CCS expand the page limit of the proposal response?

CCS RESPONSE: CCS has placed a 30-page limit on the maximum size of proposal responses to this RFP (inclusive of all resumes).

4.39 **QUESTION:** Can Section 3.1 of the proposal response be excluded from the 30-page proposal limit? This entails the Letter of Submittal and the Certifications and Assurances Form, including the additional necessary documentation describing our requested exceptions to the contract.

CCS RESPONSE: No.

4.40 **QUESTION:** Resumes are requested in Section 3.3, Item A.2 of the RFP (on page 12). Can resumes be excluded from the 30-page proposal limit and provided in an appendix?

CCS RESPONSE: No.

There are no additional Addendum Items in this Addendum No. 2.

**ATTACHMENT A TO ADDENDUM NO. 2
RFP PROJECT NO. 2019-RFP-PS-0020**



Community Colleges of Spokane

District Administration Services

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509-434-5037
509-434-5055 FAX
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December 30, 2019

Vendor Name
Vendor Address
City, WA 99???

Vendor Name:

On January 6, 2020, a Request for Proposal (RFP) will be officially released by the Community Colleges of Spokane (CCS), seeking a strategic planning facilitator to assist CCS in the development of our 2021-26 strategic plan. You were identified during a search of regional consultants who may perform such services. If you are interested in reviewing the RFP and submitting a proposal, you can find the request and requirements at the following web address once posted on January 6, 2020:

<https://ccs.spokane.edu/About-Us/Leadership/Vision>

In summary, the scope of work includes:

- Facilitating stakeholder discussions focused on CCS' perceived strengths, weaknesses, opportunities and threats.
- Facilitating CCS' strategic planning team discussions and identification of CCS' strategic issues.
- Facilitating the planning team's development of CCS' strategic pillars (mission, vision & values).
- Facilitating the planning team in identifying CCS' competitive advantages.
- Facilitating the planning team in determining and recommending CCS' strategic priorities.
- Preparing a record of all facilitated discussions/decisions and producing documentation.
- Assisting CCS with presentation of outcomes.

The RFP's timeline requires submittal by not later than noon, Friday, January 31, 2020. More information regarding RFP requirements can be found at the above web address after it is posted on January 6, 2020. We hope you will consider assisting CCS in this important work.

Thank you in advance for your consideration.

Greg Stevens
Chief Strategy and Administration Officer