

WASHINGTON STATE SCHOOL DIRECTORS' ASSOCIATION

REQUEST FOR PROPOSALS (RFP)

RFP NO. 2014-RFP001

NOTE: *If you download this RFP from an agency website located at: www.wssda.org, you are responsible for sending your name, address, e-mail address, and telephone number to the RFP Coordinator in order for your organization to receive any RFP amendments or bidder questions/agency answers.*

PROJECT TITLE: WSSDA Conference Project Manager

PROPOSAL DUE DATE: July 29, 2014 – 3:00 p.m., Pacific Standard Time

E-mailed bids will be accepted. Faxed bids will not.

ESTIMATED TIME PERIOD FOR CONTRACT: January 1, 2015 plus potential exhibitor pre-sales at 2014 conference – December 31, 2017 or completion of contracted duties, whichever comes later.

WSSDA reserves the right to extend the contract for up to two additional one-year periods at the sole discretion of WSSDA.

CONSULTANT ELIGIBILITY: This procurement is open to those consultants that satisfy the minimum qualifications stated herein and that are available for work in Washington State.

SUBMIT PROPOSAL TO: Proposal delivery by mail:
WSSDA RFP, 221 College St. NE, Olympia, WA 98516

Proposal delivery by email:
c.miller@wssda.org

CONTENTS OF THE REQUEST FOR PROPOSALS:

1. Introduction
2. General Information for Consultants
3. Proposal Contents
4. Evaluation and Contract Award
5. RFP Exhibits
 - Certifications and Assurances
 - Sample Contract
 - General Terms and Conditions

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INTRODUCTION

1.1. PURPOSE AND BACKGROUND

The Washington State School Directors' Association (WSSDA) is initiating this Request for Proposals (RFP) to solicit proposals from full service conference management companies to provide overall management of the 2015, 2016 and 2017 WSSDA Annual Conferences.

The conference takes place each November on alternating east/west sides of the Cascade Mountain Range. It is the premier educational gathering of school board members in Washington, with an average of 1,000 attendees, 60 exhibitors, 3 keynote speakers, numerous committee and related meetings, and 70 breakout sessions over three days, preceded by a day of early-bird workshops. Learn more at: <http://wssda.org/Events/AnnualConference.aspx>.

WSSDA is made up of all 1,477 school board members from Washington State's 295 public school districts. WSSDA's mission is to provide leadership and advocacy, and empower our members with knowledge and skills to govern with excellence. Learn more at: <http://wssda.org/AboutUs.aspx>.

1.2. OBJECTIVES AND SCOPE OF WORK

This RFP constitutes a request for competitive proposals for services/products as described below. WSSDA intends to award one contract to provide the services described in this RFP.

The scope of work for the proposed full-service conference management contract includes:

- Speaker/Proposal Administration and Management
- Audiovisual, Multimedia, and Internet
- Budget Management
- Conference Management & Meeting Planning
- Event Consulting and Development
- Exhibit Management
- Food and Beverage Management
- Online Registration (for both conference and exhibitors/sponsors)
- On-Site Staff
- Site Selection, Negotiations, & Contracting
- Social Networking
- Sponsor Management
- Timeline Development and Management
- Vendor and Hotel Selection, Negotiations, Contracting, & Management

Proposers are encouraged to express their knowledge of the scope of work cited above as well as creative ideas to achieve a successful conference based on conference management experience.

1.3. MINIMUM QUALIFICATIONS

Minimum qualifications include:

- 1.3.1. Licensed to do business in the state of Washington or provide a commitment that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor.
- 1.3.2. Demonstrated event management experience with specific focus on work planning, status reporting, issue management, and budget management.
- 1.3.3. Demonstrated experience negotiating and managing contracts for convention and hotel space (including attrition).
- 1.3.4. Demonstrated experience recruiting and retaining exhibitors.
- 1.3.5. Experience running RFP's for Washington State agencies in compliance with Washington State audit requirements.
- 1.3.6. Five years' experience as a full-service conference management firm.

1.4. FUNDING

Any contract awarded as a result of this RFP is contingent upon the availability of funding. The Consultant shall provide their most favorable and competitive cost estimate to perform the work.

1.5. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about January 1, 2015 and end on or about December 31, 2017. The contract may begin earlier if the Consultant is contracted to provide exhibitor pre-sales at the 2014 conference, and ends when all contracted services, including all financials for the 2017 conference, are completed and submitted to WSSDA. Amendments extending the period of performance, if any, shall be at the sole discretion of WSSDA.

WSSDA reserves the right to extend the contract for two one-year periods. Decisions to amend shall be based on sustained satisfactory performance as decided by WSSDA, successful completion of project objectives, and availability of funding.

Additional services appropriate to the original scope of this RFP, as determined by WSSDA, may be added to the resulting contract by a written amendment mutually agreed to and executed by WSSDA and the Consultant.

1.6. CONTRACTING WITH CURRENT OR FORMER STATE EMPLOYEES

Specific restrictions apply to contracting with current or former state employees pursuant to chapter 42.52 of the Revised Code of Washington. Proposers should familiarize themselves with the requirements prior to submitting a proposal that includes current or former state employees.

1.7. DEFINITIONS

Definitions for the purposes of this RFP include:

- 1.7.1. Apparent Successful Contractor – The consultant selected as the entity to perform the anticipated services, subject to completion of contract negotiations and execution of a written contract.
- 1.7.2. Consultant – Individual or company interested in the RFP and that may or does submit a proposal in order to attain a contract with WSSDA.
- 1.7.3. Contractor – Individual or company whose proposal has been accepted by WSSDA and is awarded a fully executed, written contract.
- 1.7.4. Proposal – A formal offer submitted in response to this solicitation.
- 1.7.5. Proposer – Individual or company that submits a proposal in order to attain a contract with WSSDA.
- 1.7.6. Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the consultant community to suggest various approaches to meet the need at a given price.
- 1.7.7. RFP Coordinator – The RFP Coordinator is the sole point of contact in WSSDA for this procurement.
- 1.7.8. WSSDA – The Washington State School Directors' Association is an agency of the state of Washington. WSSDA is issuing this RFP.

1.8. AMERICANS WITH DISABILITIES ACT (ADA)

WSSDA complies with the Americans with Disabilities Act (ADA). Consultants may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

2. GENERAL INFORMATION FOR CONSULTANTS

2.1. RFP COORDINATOR

The RFP Coordinator is the sole point of contact in WSSDA for this procurement. All communication between the Consultant and WSSDA upon release of this RFP shall be with the RFP Coordinator, as follows:

Name	Colleen Miller, Director of Leadership Development Services
E-mail Address	c.miller@wssda.org
Mailing Address	WSSDA 221 College Street NE Olympia, WA 98516
Physical Address for Delivery	Same as above
Phone Number	(360) 252-3006 or (800) 562-8927
Fax Number	(360) 252-3022

Any other communication will be considered unofficial and non-binding on WSSDA. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.

2.2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Post Legal Notice	June 30 2 weeks prior to issuing RFP
Issue Request for Proposals	July 14
Question & answer period	July 21-23
Issue last addendum to RFP	July 28
Proposals due	July 29, 3:00 p.m.
Evaluate proposals	July 30-August 12
Conduct oral interviews with finalists, if required	September 4-9
Announce "Apparent Successful Contractor" and send notification via fax or e-mail to unsuccessful proposers	September 12
Hold debriefing conferences (if requested)	September 15-19
Protest period	September 16-24
Protest review	October 1
Proposal acceptance	October 1
Anticipated contract start date	January 1, 2015 (November 1, 2014 if exhibitor pre-sales are included – refer to Section 1.5)

WSSDA reserves the right to revise the above schedule.

2.3. SUBMISSIONS OF PROPOSALS

Consultants are required to submit the proposal via email. Additionally, two (2) hard copies with original signatures must be provided. The proposal must arrive at WSSDA no later than 3:00 p.m., Pacific Time, on July 29, 2014.

The proposal is to be sent to the RFP Coordinator at the email and mailing addresses noted in Section 2.1.

Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of WSSDA and will not be returned.

2.4. PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Proposals submitted in response to this competitive procurement shall become the property of WSSDA. All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Acting Executive Director of WSSDA, or his/her Designee/Delegate, and the apparent successful Contractor; thereafter, the proposals shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW).

Any information in the proposal that the Consultant desires to claim as proprietary and exempt from disclosure under the provisions of Chapter 42.56 RCW, or other state or federal law that provides for the nondisclosure of your document, must be clearly designated. The information must be clearly identified and the particular exemption from disclosure upon which the Consultant is making the claim must be cited. Each page containing the information claimed to be exempt from disclosure must be clearly identified by the words "Proprietary Information" printed on the lower right hand corner of the page. Marking the entire proposal exempt from disclosure or as Proprietary Information will not be honored.

Prices quoted in your proposal are not a trade secret.

If a public records request is made for the information that the Consultant has marked as "Proprietary Information," WSSDA will notify the Consultant of the request and of the date that the records will be released to the requester unless the Consultant obtains a court order enjoining that disclosure. If the Consultant fails to obtain the court order enjoining disclosure, WSSDA will release the requested information on the date specified. If a Consultant obtains a court order from a court of competent jurisdiction enjoining disclosure pursuant to Chapter 42.56 RCW, or other state or federal law that provides for nondisclosure, WSSDA shall maintain the confidentiality of the Consultant's information per the court order.

A charge will be made for copying and shipping, as outlined in RCW 42.56. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

2.5. REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be provided via e-mail, to all individuals, who have made the RFP Coordinator aware of their interest. Addenda will also be published on www.wssda.org. For this purpose, the published questions and answers and any other pertinent information shall be provided as an addendum to the RFP and will be placed on the website.

If you downloaded this RFP from WSSDA website located at: www.wssda.org, you are responsible for sending your name, e-mail address, and telephone number to the RFP Coordinator in order for your organization to receive any RFP addenda.

WSSDA also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

2.6. MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with Chapter 39.19 RCW, the state of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award and proposals will not be rejected or considered non-responsive on that basis.

The established annual procurement participation goals for MBE is 10% and for WBE, 4%, for this type of project. These goals are voluntary. For information on certified firms, consultants may contact OMWBE at (360) 753-9693 or <http://www.omwbe.wa.gov>.

2.7. ACCEPTANCE PERIOD

Proposals must provide 60 days for acceptance by WSSDA from the due date for receipt of proposals.

2.8. RESPONSIVENESS

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The Consultant is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

WSSDA also reserves the right at its sole discretion to waive minor administrative irregularities.

2.9. MOST FAVORABLE TERMS

WSSDA 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 which the Consultant can propose. There will be no best and final offer

procedure. WSSDA does reserve the right to contact a Consultant for clarification of its proposal.

The Apparent Successful Contractor 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 Consultant's proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to WSSDA.

2.10. CONTRACT AND GENERAL TERMS & CONDITIONS

The apparent successful contractor will be expected to enter into a contract which is substantially the same as the sample contract and its general terms and conditions attached as Exhibit C. In no event is a Consultant to submit its own standard contract terms and conditions in response to this solicitation. The Consultant may submit exceptions as allowed in the Certifications and Assurances form, Exhibit A to this solicitation. All exceptions to the contract terms and conditions must be submitted as an attachment to Exhibit A, Certifications and Assurances form. WSSDA will review requested exceptions and accept or reject the same at its sole discretion.

2.11. COSTS TO PROPOSE

WSSDA will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

2.12. NO OBLIGATION TO CONTRACT

This RFP does not obligate WSSDA to contract for services specified herein.

2.13. REJECTION OF PROPOSALS

WSSDA reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

2.14. COMMITMENT OF FUNDS

The Acting Executive Director or Executive Director of WSSDA, or his/her delegate/designee, are the only individuals who may legally commit WSSDA 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.

2.15. INSURANCE COVERAGE

The Contractor is to furnish WSSDA with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The Contractor shall, at its own expense, obtain and keep in force insurance coverage which shall be maintained in full force and effect during the term of the contract. The Contractor shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to WSSDA **within fifteen (15) days of the contract effective date. Failure to do so will be considered a breach of the contract by the Contractor.**

2.15.1. Liability Insurance. Commercial General Liability Insurance: Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the “each occurrence” limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the “each occurrence” limit. CGL insurance shall be written on ISO occurrence from CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insureds (cross liability) condition.

Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

2.15.2. Business Auto Policy. As applicable, the Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than \$1,000,000 per accident. Such insurance shall cover liability arising out of “Any Auto.” Business auto coverage shall be written on ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

2.15.3. Employers Liability (“Stop Gap”) Insurance. In addition, the Contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

2.16. ADDITIONAL PROVISIONS

The above insurance policy shall include the following provisions:

2.16.1. Additional Insured. WSSDA, its elected and appointed officials, agents and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the state.

2.16.2. Cancellation. WSSDA shall be provided with written notice before cancellation or non-renewal of any insurance referred to herein by the Contractor as soon as possible.

2.16.3. **Identification.** Contractor's Certificate of Insurance shall reference the contract number and conference date.

2.16.4. **Insurance Carrier Rating.** All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best's Reports. Any exception shall be reviewed and approved by WSSDA before the contract is accepted or work may begin.

2.16.5. **Excess Coverage.** By requiring insurance herein, WSSDA does not represent that coverage and limits will be adequate to protect Contractor and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to WSSDA in this contract.

2.17. **WORKERS' COMPENSATION COVERAGE**

The Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. WSSDA will not be held responsive in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

3. PROPOSAL CONTENTS

Proposals must be written in English and submitted on eight and one-half by eleven inch (8 ½" x 11") paper with tabs separating the major sections of the proposal. The Letter of Submittal, excluding the signed attachments, shall be a maximum of two pages. The four major sections of the proposal are to be submitted in the order noted below:

- **Letter of Submittal, plus signed**
 - Certifications and Assurances (Exhibit A to this RFP)
 - Sample Contract (Exhibit B to this RFP)
- **Technical Proposal**
- **Management Proposal**
- **Cost Proposal**

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Consultant in preparing a thorough response.

Items marked "mandatory" must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked "scored" are those that are awarded points as part of the evaluation conducted by the evaluation team.

3.1. LETTER OF SUBMITTAL (MANDATORY)

The Letter of Submittal, and applicable forms, must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, (e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship).

Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Consultant and any proposed subcontractors:

- 3.1.1. Name, address, principal place of business, telephone and fax numbers, and e-mail address of legal entity or individual with whom contract would be written.
- 3.1.2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.).
- 3.1.3. Location of the facility from which the Consultant would operate.
- 3.1.4. Legal status of the Consultant (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
- 3.1.5. Federal Employer Tax Identification number or Social Security number and the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue. If the Consultant does not have a UBI number, the Consultant must state that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor.
- 3.1.6. Identify any state employees or former state employees employed or on the firm's governing board as of the date of the proposal. Include their position and responsibilities within the Consultant's organization. If following a review of this

information, it is determined by WSSDA that a conflict of interest exists, the Consultant may be disqualified from further consideration for the award of a contract.

3.1.7. A detailed list of all materials and enclosures included in the Proposal.

3.2. EXECUTIVE SUMMARY (MANDATORY)

Include an executive summary providing a condensed overview of the contents of the Proposal demonstrating an understanding of the services to be performed.

3.3. PREVIOUS CONTRACT HISTORY (MANDATORY)

Consultant will submit information associated with any contract termination action taken against the Consultant, or any proposed subcontractor, during the past three years. All such instances must be described per the guidelines below.

- Consultant must submit full details of all terminations for default experienced by the Consultant during the past three years, including the other party's name, address and telephone number. The response to this subsection must present the Consultant's position on the matter.
 - Termination for default is defined as notice to stop performance due to Contractor's nonperformance or poor performance.
 - If no such terminations for default have been experienced in the past three years, so declare.
- If at any time during the past three years, the Bidder has had a contract terminated for convenience, non-performance, non-allocation of funds, or any other reason, which termination occurred before completion of all obligations under the initial contract provisions, describe fully all such terminations including the name and address of the other contracting party and the circumstances surrounding the termination.
 - If no such early terminations have occurred in the past three years, so declare.

3.4. TECHNICAL PROPOSAL (SCORED)

The Technical Proposal must contain a comprehensive description of service deliverables including the following elements:

- A. **Project Approach/Methodology** – Include a complete description of the Consultant's proposed approach and methodology for the project.
- B. **Work Plan** – Include all project requirements and the proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP.
- C. **Deliverables** – Fully describe deliverables to be submitted under the proposed contract.

- D. **Outcomes and Performance Measurement** – Describe the impacts/outcomes the Consultant proposes to achieve as a result of the delivery of these services including how these outcomes would be monitored, measured and reported to WSSDA. Please note: Mere repetition of the Scope of Work will not be considered responsive.
- E. **Risks** – Define potential risks you identify as being significant to the success of the project. Include how you propose to effectively monitor and manage these risks, including reporting of risks to WSSDA’s contract manager.

REQUIREMENTS

Submit technical requirements under the following headings:

1. Speaker/Proposal Administration and Management
2. Audiovisual, Multimedia and Internet
3. Budget Management
4. Conference Management& Meeting Planning
5. Event Consulting and Development
6. Exhibit Management
7. Food and Beverage Management
8. Online Registration (for both conference and exhibitors/sponsors)
9. On-Site Staff
10. Site Selection, Negotiations, & Contracting
11. Social Networking
12. Sponsor Management
13. Timeline Development and Management
14. Vendor and Hotel Selection, Negotiations, Contracting, & Management

3.5. MANAGEMENT PROPOSAL (SCORED)

3.5.1. Project Management

- 3.5.1.1. **Project Team Structure/Internal Controls** – Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Include who within the firm will have prime responsibility and final authority for the work.
- 3.5.1.2. **Staff Qualifications/Experience** – Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. The Consultant must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of WSSDA.
- 3.5.1.3. **Staff Roles and Responsibilities**

3.6. EXPERIENCE OF THE CONSULTANT (SCORED)

- 3.6.1. Indicate the experience the Consultant and any subcontractors have in the following areas associated with:
 - 3.6.1.1. State agencies
 - 3.6.1.2. School boards, superintendents, or school districts
 - 3.6.1.3. Exhibitor and sponsor development and management
 - 3.6.1.4. Conference management
 - 3.6.1.5. Data management
 - 3.6.1.6. Finance management
- 3.6.2. Indicate other relevant experience.
- 3.6.3. Include a list of contracts the Consultant has had during the last five years that relate to the Consultant's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.

3.7. REFERENCES (MANDATORY)

List names, addresses, telephone numbers, and fax numbers/e-mail addresses of three (3) business references for the Consultant and three (3) business references for the lead staff person for whom work has been accomplished and briefly describe the type of service provided. Do not include current WSSDA staff as references. By submitting a proposal in response to this Work Request, the vendor and team members grant permission to WSSDA to contact these references and others, who from WSSDA's perspective, may have pertinent information. WSSDA may or may not, at its discretion, contact references. WSSDA may evaluate references at WSSDA's discretion.

3.8. OMWBE CERTIFICATION (OPTIONAL AND NOT SCORED)

Include proof of certification issued by the Washington State Office of Minority and Womens Business Enterprises (OMWBE) if certified minority-owned firm and/or women-owned firm(s) will be participating on this project. For information: <http://www.omwbe.wa.gov>.

3.9. COST PROPOSAL (SCORED)

The evaluation process is designed to award this procurement not necessarily to the Consultant of least cost, but rather to the Consultant whose proposal best meets the requirements of this RFP. However, Consultants are encouraged to submit proposals which are consistent with state government efforts to conserve state resources.

3.10. IDENTIFICATION OF COSTS (SCORED)

Identify all costs in U.S. dollars including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Consultant is to submit a fully detailed budget including staff costs and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Consultants are required to collect and pay Washington state sales and use taxes, as applicable.

3.11. USE OF SUBCONTRACTORS

Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Office of Minority and Women's Business Enterprises.

3.12. COMPUTATION

The score for the cost proposal will be based on a combination of the total dollar value of the bid and the perceived value of services received for that cost.

4. EVALUATION AND CONTRACT AWARD

4.1. EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team(s), to be designated by WSSDA, which will determine the ranking of the proposals.

The RFP Coordinator may contact the Consultant for clarification of any portion of the Consultant's proposal.

4.2. EVALUATION WEIGHTING AND SCORING

The following weighting and points will be assigned to the proposal for evaluation purposes:

WSSDA reserves the right to award the contract to the Consultant whose proposal is deemed to be in the best interest of WSSDA.

Proposal Scoring Sheet			
RFP #:			
Title:			
Reviewer:			
Reviewers rate each category 1-5			
5 = exceptional, 4 = outstanding, 3 = good, 2 = needs improvement, 1 = weak			
For 25% weight: 5 = 25%, 4 = 20%, 3 = 15%, 2 = 10%, 1 = 5%			
For 20% weight: 5 = 20%, 4 = 15%, 3 = 10%, 2 = 5%, 1 = 0%			
For 12.5% weight: 5 = 12.5%, 4 = 10.0%, 3 = 7.5%, 2 = 5.0%, 1 = 2.5%			
Cost of Services			
Overall cost		\$	
Perceived value for cost on the 5 point scale noted above			
Strength of the Proposal		Points	Weight
Responsiveness to the RFP			20%
Strength of the approach			20%
Creativity in leveraging resources			20%
Samples of work products			20%
Overall proposal (complete, clear, professional)			20%
			100%
Comments:			
Qualifications and Experience 1		Points	Weight
Finance & Online Registration Management			20%
Speaker/Proposal Administration and Management			20%
Exhibit Management			20%
Food and Beverage Management			20%
Site Selection, Negotiations, & Contracting			20%
			100%
Comments:			
Qualifications and Experience 2		Points	Weight
AudioVisual, Multimedia and Internet			12.5%
Conference Management & Meeting Planning			12.5%
Event Consulting and Development			12.5%
Staffing			12.5%
Social Networking			12.5%
Sponsor Management			12.5%
Timeline Development and Management			12.5%
Vendor and Hotel Selection, Negotiations, Contracting, & Management			12.5%
			100%
Comments:			
Total Score:			100%

Oral Presentation Scoring Sheet

RFP #: _____
 Title: _____
 Reviewer: _____

Reviewers rate each category 1-5
 5 = exceptional, 4 = outstanding, 3 = good, 2 = needs improvement, 1 = weak
 For 25% weight: 5 = 25%, 4 = 20%, 3 = 15%, 2 = 10%, 1 = 5%
 For 20% weight: 5 = 20%, 4 = 15%, 3 = 10%, 2 = 5%, 1 = 0%
 For 12.5% weight: 5 = 12.5%, 4 = 10.0%, 3 = 7.5%, 2 = 5.0%, 1 = 2.5%

Cost of Services

Overall cost \$ _____
 Perceived value for cost on the 5 point scale noted above _____

Strength of the Proposal

	Points	Weight	Rating
Responsiveness to the RFP		20%	
Strength of the approach		20%	
Creativity in leveraging resources		20%	
Samples of work products		20%	
Overall proposal (complete, clear, professional)		20%	
		100%	
Comments:			

Strength and Cohesiveness of the Project Team

	Points	Weight	Rating
Overall ability to manage the project		25%	
Technical ability to execute tasks		25%	
Research/analysis ability		25%	
Overall team cohesiveness		25%	
		100%	
Comments:			

Qualifications and Experience 1

	Points	Weight	Rating
Finance & Online Registration Management		20%	
Speaker/Proposal Administration and Management		20%	
Exhibit Management		20%	
Food and Beverage Management		20%	
Site Selection, Negotiations, & Contracting		20%	
		100%	
Comments:			

Qualifications and Experience 2

	Points	Weight	Rating
AudioVisual, Multimedia and Internet		12.5%	
Conference Management & Meeting Planning		12.5%	
Event Consulting and Development		12.5%	
Staffing		12.5%	
Social Networking		12.5%	
Sponsor Management		12.5%	
Timeline Development and Management		12.5%	
Vendor and Hotel Selection, Negotiations, Contracting, & Management		12.5%	
		100%	
Comments:			

4.3. ORAL PRESENTATIONS MAY BE REQUIRED

WSSDA may, after evaluating the written proposals, elect to schedule oral presentations of the finalists. Should oral presentations become necessary, WSSDA will contact the top-scoring firm(s) from the written evaluation to schedule a date, time and location. Commitments made by the Consultant at the oral interview, if any, will be considered binding.

The scores from the written evaluation and the oral presentation, combined with the judgment of the interview team, will determine the apparent successful contractor.

4.4. NOTIFICATION TO PROPOSERS

WSSDA will notify the Apparently Successful Contractor of their selection in writing upon completion of the evaluation process. Individuals or firms whose proposals were not selected for further negotiation or award will be notified separately by e-mail.

4.5. DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Any Consultant who has submitted a proposal and been notified that they were not selected for contract award may request a debriefing. Debriefing requests must be received by the RFP Coordinator no later than 5:00 PM, local time, in Olympia, Washington on the third business day following the transmittal of the Unsuccessful Consultant Notification. The debriefing must be held within three (3) business days of the request.

Discussion at the debriefing conference will be limited to the following:

- Evaluation and scoring of the firm's proposal;
- Critique of the proposal based on the evaluation;
- Review of proposer's final score in comparison with other final scores without identifying the other firms.

Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

4.6. PROTEST PROCEDURE

Protests may be made only by Consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Consultant is allowed three (3) business days to file a protest of the acquisition with the RFP Coordinator. Protests must be received by the RFP Coordinator no later than 4:30 PM, local time, in Olympia, Washington on the third business day following the debriefing. Protests may be submitted by e-mail or facsimile, but must then be followed by the document with an original signature.

Consultants protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to Consultants under

this procurement.

All protests must be in writing, addressed to the RFP Coordinator, and signed by the protesting party or an authorized Agent. The protest must state the RFP number, the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of an evaluator;
- Errors in computing the score;
- Non-compliance with procedures described in the procurement document or WSSDA policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, or 2) WSSDA's assessment of its own and/or other agencies needs or requirements.

Upon receipt of a protest, a protest review will be held by WSSDA. WSSDA's Acting Executive Director or Executive Director or an employee delegated by the Director who was not involved in the procurement will consider the record and all available facts and issue a decision within five (5) business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Consultant that also submitted a proposal, such Consultant will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold WSSDA's action; or
- Find only technical or harmless errors in WSSDA's acquisition process and determine WSSDA's to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide WSSDA options which may include:
 - Correct the errors and re-evaluate all proposals, and/or
 - Reissue the solicitation document and begin a new process, or
 - Make other findings and determine other courses of action as appropriate.

If WSSDA determines that the protest is without merit, WSSDA will enter into a contract with the apparently successful contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

5. RFP EXHIBITS

EXHIBIT A – CERTIFICATIONS AND ASSURANCES

EXHIBIT B – SAMPLE CONTRACT

EXHIBIT C – GENERAL TERMS AND CONDITIONS (GT&CS)

EXHIBIT A: CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract:

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by WSSDA without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. If there are exceptions to these assurances, I/we have described them in full detail on a separate page attached to this document.
5. I/we understand that WSSDA will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of WSSDA, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other Proposer or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
9. I/we grant WSSDA the right to contact references and other, who may have pertinent information regarding the ability of the Consultant and the lead staff person to perform the services contemplated by this RFP.
10. If any staff member(s) who will perform work on this contract has retired from the State of Washington under the provisions of the 2008 Early Retirement Factors legislation, his/her name(s) is noted on a separately attached page.

We (circle one) **are / are not** submitting proposed Contract exceptions. (See Section 2.10, Contract and General Terms and Conditions.) If Contract exceptions are being submitted, I/we have attached them to this form.

On behalf of the Consultant submitting this proposal, my name below attests to the accuracy of the above statement. *If electronic, also include: We are submitting a scanned signature of this form with our proposal.*

Signature of Proposer

Title

Date

EXHIBIT B: SAMPLE CONTRACT FOR SERVICES

**BETWEEN
THE WASHINGTON STATE SCHOOL DIRECTORS' ASSOCIATION
AND
<INSERT CONTRACTOR'S NAME>**

This Contract is made and entered into by and between The Washington State School Directors' Association, hereinafter referred to as "WSSDA", and the below named firm, hereinafter referred to as "CONTRACTOR,"

(Contractor Name)

(Address)

(City, State Zip)

Phone: [REDACTED]

Email: [REDACTED]

Federal ID No.: [REDACTED]

WA State UBI No.: [REDACTED]

PURPOSE

The purpose of this contract is for CONTRACTOR to provide WSSDA with sole-source, full-service management of the 2015, 2016 and 2017 WSSDA Annual Conferences.

DUTIES OF CONTRACTOR:

The CONTRACTOR will provide services, and otherwise do all things necessary for or incidental to the performance of work, as set forth below:

General Conference Management:

- Act in the best interests of WSSDA in any and all ways possible and make all efforts to represent WSSDA in a professional manner;
- Maintain necessary and frequent contact with WSSDA staff and provide monthly updates regarding conference planning progress;
- Promptly respond to all correspondence;
- Review and provide input for all conference communications, including website content, e-mail blasts, and the conference program;
- Participate in post-conference discussions to ensure future success of WSSDA Annual Conferences, regardless of whether CONTRACTOR is contracted to provide services therefor;
- Conduct all financial processes in accordance with WSSDA finance department processes;
- Provide weekly reports of all financial activity and a monthly report on the last business day of each month to the WSSDA finance department;
- Review final bills for accuracy;

- Ensure payments made for event activities that are mailed directly to CONTRACTOR are made payable to WSSDA and kept in a secure place while in the possession of CONTRACTOR;
- Provide prior notice to the WSSDA Director of Finance of any and all mailings of payments, including a breakdown of the enclosed checks by date, payor and amount and ensure secure transfer of payments to WSSDA.

Registration:

- Provide and manage a customizable, online registration platform in a format compatible with WSSDA financial and member management systems and equipped to handle registration questions and inquiries by registrants;
- Provide financial tracking and reporting on registrations and hotel reservations;
- Manage on-site registration;
- Provide detailed registration report for WSSDA review;
- Provide electronic marketing blasts;
- Assemble registration packets and materials prior to conference using materials provided/approved by WSSDA and exhibitors/sponsors.
- WSSDA reserves the right to provide its own registration system for any and all Annual Conferences subject to this Agreement at its discretion and upon appropriate notice to CONTRACTOR. WSSDA will not be obligated to pay CONTRACTOR for this service and related processes if WSSDA elects to use its own registration system.

Meeting Management:

- Work directly with WSSDA's main point of contact for the WSSDA Annual Conference;
- Co-develop and manage with WSSDA a project timeline for each conference;
- Coordinate and manage all conference logistics related to the venue including, but not limited to, food and beverage, room sets, parking, special needs of attendees, etc;
- Manage onsite setup of all non-registration areas;
- Manage conference and related activities including, but not limited to, room checks, event oversight, setup confirmation, vendor logistics, setup and departure logistics;
- Manage all workshops, breakout sessions, and special events including, but not limited to, general sessions, Delegate Assembly, President's Awards and Reception, meetings, and entertainment groups ; and manage special event logistics including, but not limited to, meal function AV requirements, parking, arrival, in pre-planning and onsite;
- Coordinate with WSSDA to manage and confirm the VIP/staff housing list;
- Coordinate with WSSDA to identify and negotiate contracts with overflow hotels;
- Ensure accuracy of event orders;
- Work with visitors' bureaus to manage hotel room pick-up, and apprise WSSDA of any potential attrition risk;
- Provide information to WSSDA for website content and links regarding conference registration and housing;
- Create online registration and housing forms and provide link to insert on the WSSDA website;
- Provide input to WSSDA regarding online content and messaging about Annual Conference;
- Manage conference signage (as created by WSSDA);
- Manage logistics for session materials and AV to be in rooms;
- Manage shuttle transportation for offsite sessions;

- Manage AV providers, equipment requests and set-up and tear-down of any WSSDA-provided AV.

Speaker and Conference Agenda Management:

- Provide and manage a customizable, online presenter and session management system in a format compatible with WSSDA financial and member management systems;
- Review all speaker and session content for accuracy and alignment with WSSDA guidelines;
- Provide program, speaker and content downloads for WSSDA's use throughout the year including a final download post-conference;
- Provide program/schedule information to allow WSSDA to create a printed program;
- Manage all logistics for presenters, both in pre-planning and on-site;
- Manage call for presenters process including, but not limited to, online proposal submissions, session rating, and acceptance notifications;
- Provide grid of session rooms and times for WSSDA review;
- Survey registrants to identify session interest and use results to modify room assignments as needed.

Exhibitor and Sponsor Management:

- Manage registration for all exhibitors;
- Recruit exhibitors and sponsors. CONTRACTOR will receive a commission of \$100 per exhibitor directly secured and a commission of 10% of committed sponsor fees per sponsor directly secured for each Annual Conference. However, CONTRACTOR will receive no commission if WSSDA secures the exhibitor or sponsor;
- Coordinate exhibit booth placement, hall management and design, AV, set-up and tear-down;
- Provide online registration platform and services for exhibitors and sponsors in a format compatible with WSSDA financial and member management systems, including an interactive booth map;
- Provide online payment processing and financial reporting. Mail all checks to WSSDA weekly;
- Coordinate with contracted decorator;
- Send exhibitor information kits;
- Pre-print exhibitor badges;
- Provide on-site exhibitor registration station with printer;
- Provide dedicated technology to handle all exhibitor and sponsor questions and inquiries; act as point of contact.

Convention Center and Hotel Site Selection, and Room Block Management:

- Develop and manage Request for Proposals to select conference venues;
- Develop and manage Request for Proposals to select primary and overflow conference hotels;
- Provide recommendations to WSSDA regarding appropriate sites and rates;
- Act as consulting agent for WSSDA on contract review. Negotiate best rates and amenities on WSSDA's behalf and provide all proposed contracts for WSSDA's signature;
- Coordinate and participate in one on-site visit with WSSDA staff to contracted hotel;
- Manage executed contracts on WSSDA's behalf to ensure compliance;
- Manage hotel room blocks in an effort to protect WSSDA from attrition.

Vendor selection and management:

- On behalf of WSSDA, develop and manage Requests for Proposals and/or selection process for vendors required for each conference, including, but not limited to: AV, decorator, catering, shuttle service, band for President's Reception, book store;
- Provide WSSDA with recommendations regarding best selections and rates;
- Negotiate best rates possible to achieve the best service on WSSDA's behalf;
- Provide proposed contracts for WSSDA signature;
- Manage executed contracts to ensure all parties' compliance with terms.

DUTIES OF WSSDA:

WSSDA will provide services, and otherwise do all things necessary for or incidental to the performance of work, as set forth below:

- Provide one Annual Conference liaison as primary point of contact;
- Provide initial member listing for upload into CONTRACTOR's registration system;
- Supply and pay for any tables, signage, power, telephone lines, hard line internet access which may be required for the on-site attendee and exhibitor registration set-up;
- Provide at least four hours for on-site registration set-up;
- Provide badge stock, lanyards and badge-holders for CONTRACTOR pick-up and use, if necessary;
- Provide up to four (4) double occupancy rooms at the headquarter hotel as part of the WSSDA room block. Check-in will be available the night before set-up days and check-out will be on the final day of the conference.
- Reimburse CONTRACTOR's staff meals and parking expenses at actual cost in accordance with WSSDA Operating Policies. No alcohol will be reimbursed. CONTRACTOR's staff will be included in the meal count for any meals provided during the conference.
- Review and respond to conference logistics questions from CONTRACTOR within mutually agreed upon response times.
- Provide CONTRACTOR with space use and event requests no later than two months prior to conference. Changes and/or additions may be provided by WSSDA up to and through the event. However, WSSDA agrees to minimize changes after September 1 to ensure the smooth delivery of the event.
- Approve content of all tracking and request forms, email blasts, and other communications generated by CONTRACTOR prior to distribution;
- Manage keynote speaker logistics and communicate any set-up needs directly to CONTRACTOR.

Exhibit C contains the General Terms and Conditions governing work to be performed under this contract, the nature of the working relationship between WSSDA and the CONTRACTOR, and specific obligations of both parties.

PERIOD OF PERFORMANCE

Subject to other contract provisions, the period of performance under this contract will be from _____ or date of execution, whichever is later, through _____, unless sooner terminated or extended as provided herein.

COMPENSATION AND PAYMENT

CONTRACTOR'S compensation for services rendered shall be based on the following rates or in accordance with the following terms:

Registration	Dollar amount per registrant based on estimated number of registrants
Meeting Management	Flat fee
Speaker/Conference Agenda Management	Flat fee
Exhibitor and Sponsor Management	Commission of \$100 per exhibitor directly secured and 10% of committed sponsor fees directly secured (no commission provided if WSSDA secures the exhibitor or sponsor)
Convention Center and hotel site selection and room block management	Included in hotel commission
Vendor selection and management	Dollar amount per contracted vendor

BILLING PROCEDURES AND PAYMENT

NOTE: *Payment can be based upon satisfactory acceptance of each deliverable, payment after completion of each major part of the contract, payment at conclusion of the contract, etc.*

AGENCY will pay CONTRACTOR upon receipt of properly completed invoices, which shall be submitted to the Contract Manager not more often than monthly. The invoices shall document to WSSDA'S satisfaction: a description of the work performed, the progress of the project, and fees. To receive reimbursement, CONTRACTOR must provide a detailed breakdown of authorized expenses, identifying what was expended and when. A receipt must accompany any single expense in order to receive reimbursement.

Payment shall be considered timely if made by WSSDA within thirty (30) days after receipt of properly completed invoices. Payment shall be sent to the address designated by the CONTRACTOR.

WSSDA 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.

No payments in advance or in anticipation of services or supplies to be provided under this contract shall be made by WSSDA.

CONTRACT MANAGEMENT

The Contract Manager for each of the parties shall be the contact person for all communications and billings regarding the performance of this Contract.

CONTRACTOR Contract Manager	AGENCY Contract Manager
Enter Contract Manager's Name	Colleen Miller
Enter Name of CONTRACTOR	WSSDA
Enter CONTRACTOR Address	221 College Street NE
Enter City, State & Zip Code	Olymipa, WA 98516
Phone : ()	Phone: (360) 252-3006
Fax: ()	Fax: (360) 252-3022
Email address:	Email address: c.miller@wssda.org

INSURANCE

The CONTRACTOR shall provide insurance coverage as set out in this section (or as set forth in the Request for Proposals No. 2014-RFP001. The intent of the required insurance is to protect the state should there be any claims, suits, actions, costs, damages or expenses arising from any negligent or intentional act or omission of the CONTRACTOR or subcontract, or agents of either, while performing under the terms of this contract.

The CONTRACTOR shall provide insurance coverage which shall be maintained in full force and effect during the term of this Contract, as follows:

1. Commercial General Liability Insurance Policy – Provide a Commercial General Liability Insurance Policy, including contractual liability, in adequate quantity to protect against legal liability arising out of contract activity but no less than \$1,000,000 per occurrence. Additionally, the CONTRACTOR is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.
2. Automobile Liability – In the event that services delivered pursuant to this contract involve the use of vehicles, either owned or unowned by the CONTRACTOR, automobile liability insurance shall be required. The minimum limit for automobile liability is:

\$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage
3. The insurance required shall be issued by an insurance company/ies authorized to do business within the state of Washington, and shall name the state of Washington, its agents and employees as additional insureds under the insurance policy/ies. All policies shall be primary to any other valid and collectable insurance. CONTRACTOR shall instruct the insurers to give AGENCY 30 days advance notice of any insurance cancellation.

CONTRACTOR shall submit to AGENCY within fifteen days of the contract effective date, a certificate of insurance which outlines the coverage and limits defined in the Insurance section. CONTRACTOR shall submit renewal certificates as appropriate during the term of the contract.

ASSURANCES

AGENCY and the CONTRACTOR agree that all activity pursuant to this contract will be in accordance with all the applicable current federal, state and local laws, rules, and regulations.

ORDER OF PRECEDENCE

Each of the exhibits listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this contract, the inconsistency shall be resolved by giving precedence in the following order:

- Applicable federal and state of Washington statutes and regulations
- Special Terms and Conditions as contained in this basic contract instrument
- Exhibit A – Sample Contract and General Terms and Conditions
- Exhibit B – Request for Proposals No. 2014-RFP001
- Exhibit C – Contractor’s Proposal dated _____

ENTIRE AGREEMENT

This contract including referenced exhibits represents all the terms and conditions agreed upon by the parties. No other statements or representations, written or oral, shall be deemed a part hereof.

CONFORMANCE

If any provision of this contract violates any statute or rule of law of the state of Washington, it is considered modified to conform to that statute or rule of law.

APPROVAL

This contract shall be subject to the written approval of WSSDA’S authorized representative and shall not be binding until so approved. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

THIS CONTRACT, consisting of _____ pages and _____ attachment(s), is executed by the persons signing below who warrant that they have the authority to execute the contract.

[CONTRACTOR’S NAME]

[AGENCY NAME]

Signature

Signature

Title

Date

Title

Date

EXHIBIT C: GENERAL TERMS AND CONDITIONS

DEFINITIONS - As used throughout this contract, the following terms shall have the meaning set forth below:

- A. "WSSDA" shall mean the Washington State School Directors' Association of the state of Washington, any division, section, office, unit or other entity of WSSDA, or any of the officers or other officials lawfully representing WSSDA Agency.
- B. "Agent" shall mean the Acting Executive Director or Executive Director, and/or the delegate authorized in writing to act on his/her behalf.
- C. "Contractor" shall mean that firm, provider, organization, individual or other entity performing service(s) under this contract, and shall include all employees of the Contractor.
- D. "Subcontractor" shall mean one not in the employment of the Contractor, who is performing all or part of those services under this contract under a separate contract with the Contractor or WSSDA. The terms "Subcontractor" and "Subcontractors" means Subcontractor(s) in any tier.
- E. "Personal Information" means information identifiable to any person, including, but not limited to, information that relates to a person's name, health, finances, education, business, use or receipt of governmental services or other activities, addresses, telephone numbers, social security numbers, driver license numbers, other identifying numbers, and any financial identifiers. Personal Information includes "Protected Health Information" as set forth in 45 CFR § 164.50 as currently drafted and subsequently amended or revised and other information that may be exempt from disclosure to the public or other unauthorized persons under either Chapter 42.17 RCW or other state and federal statutes.

ACCESS TO DATA - In compliance with RCW 39.29.080, the Contractor shall provide access to data generated under this contract to AGENCY, the Joint Legislative Audit and Review Committee, and the state auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the Contractor's reports, including computer models and methodology for those models.

Contractor agrees to make personal information covered under this agreement available to Agency for inspection or to amend the personal information. Contractor shall, as directed by Agency, incorporate any amendments to the personal information into all copies of such personal information maintained by the Contractor or its subcontractors.

ADVANCE PAYMENTS PROHIBITED - No payments in advance of or in anticipation of goods or services to be provided under this contract shall be made by WSSDA.

AMENDMENTS - This contract may be amended by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.

AMERICANS WITH DISABILITIES ACT (ADA) OF 1990, PUBLIC LAW 101-336, also referred to as the "ADA" 28 CFR Part 35 - The Contractor must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.

ASSIGNMENT – Neither this Contract, nor shall any claim arising under this Contract, be transferred or assigned by the Contractor without prior written consent of WSSDA.

ATTORNEYS' FEES - In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney's fees and costs.

CONFIDENTIALITY / SAFEGUARDING OF INFORMATION - The Contractor shall not use or disclose any information concerning WSSDA, or information which may be classified as confidential, for any purpose not directly connected with the administration of this contract, except with prior written consent of WSSDA, or as may be required by law.

CONFLICT OF INTEREST - Notwithstanding any determination by the Executive Ethics Board or other tribunal, WSSDA may, in its sole discretion, by written notice to the Contractor terminate this contract if it is found after due notice and examination by the Agent that there is a violation of the Ethics in Public Service Act, Chapter 42.52 RCW; or any similar statute involving the Contractor in the procurement of, or performance under this contract.

In the event this contract is terminated as provided above, WSSDA shall be entitled to pursue the same remedies against the Contractor as it could pursue in the event of a breach of the contract by the Contractor. The rights and remedies of WSSDA provided for in this clause shall not be exclusive and are in addition to any other rights and remedies provided by law. The existence of facts upon which the Agent makes any determination under this clause shall be an issue and may be reviewed as provided in the "Disputes" clause of this contract.

COPYRIGHT PROVISIONS - Unless otherwise provided, all Materials produced under this contract shall be considered "works for hire" as defined by the U.S. Copyright Act and shall be owned by WSSDA. WSSDA shall be considered the author of such Materials. In the event the Materials are not considered "works for hire" under the U.S. Copyright laws, Contractor hereby irrevocably assigns all right, title, and interest in Materials, including all intellectual property rights, to WSSDA effective from the moment of creation of such Materials.

Materials means all items in any format and includes, but is not limited to, data, reports, documents, pamphlets, advertisements, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Ownership includes the right to copyright, patent, register and the ability to transfer these rights.

For Materials that are delivered under the contract, but that incorporate pre-existing materials not produced under the contract, Contractor hereby grants to WSSDA a nonexclusive, royalty-free, irrevocable license (with rights to sublicense others) in such Materials to translate, reproduce, distribute, prepare derivative works, publicly perform, and publicly display. The Contractor warrants and represents that Contractor has all rights and permissions, including intellectual property rights, moral rights and rights of publicity, necessary to grant such a license to WSSDA.

The Contractor shall exert all reasonable effort to advise WSSDA, at the time of delivery of Materials furnished under this contract, of all known or potential invasions of privacy contained therein and of any portion of such document which was not produced in the performance of this contract. WSSDA shall receive prompt written notice of each notice or claim of infringement received by the Contractor with respect to any data delivered under this contract. WSSDA shall have the right to modify or remove any restrictive markings placed upon the data by the Contractor.

COVENANT AGAINST CONTINGENT FEES - The Contractor warrants that no person or selling agent has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, excepting bona fide employees or bona fide established agents maintained by the Contractor for the purpose of securing business. WSSDA shall have the right, in the event of breach of this clause by the Contractor, to annul this contract without liability or, in its discretion, to deduct from the contract price or consideration or recover by other means the full amount of such commission, percentage, brokerage or contingent fee.

DISPUTES - Except as otherwise provided in this contract, when a dispute arises between the parties and it cannot be resolved by direct negotiation, either party may request a dispute hearing with Agent.

1. The request for a dispute hearing must:
 - Be in writing;
 - State the disputed issue(s);
 - State the relative positions of the parties;
 - State the contractor's name, address, and contract number; and
 - Be mailed to the agent and the other party's (respondent's) contract manager within 3 working days after the parties agree that they cannot resolve the dispute.
2. The respondent shall send a written answer to the requester's statement to both the agent and the requester within 5 working days.
3. The Agent shall review the written statements and reply in writing to both parties within 10 working days. The Agent may extend this period if necessary by notifying the parties.
4. The parties agree that this dispute process shall precede any action in a judicial or quasi-judicial tribunal.

Nothing in this Contract shall be construed to limit the parties' choice of a mutually acceptable ADR method in addition to the dispute resolution procedure outlined above.

GOVERNING LAW - This contract shall be construed and interpreted in accordance with the laws of the state of Washington, and the venue of any action brought hereunder shall be in the Superior Court for Thurston County.

INDEMNIFICATION - To the fullest extent permitted by law, Contractor shall indemnify, defend, and hold harmless state, agencies of state and all officials, agents and employees of state, from

and against all claims for injuries or death arising out of or resulting from the performance of the Contract. Contractor's obligation to indemnify, defend, and hold harmless includes any claim by Contractors' agents, employees, representatives, or any subcontractor or its employees.

Contractor expressly agrees to indemnify, defend, and hold harmless the state for any claim arising out of or incident to Contractor's or any subcontractor's performance or failure to perform the Contract. Contractor's obligation to indemnify, defend, and hold harmless the state shall not be eliminated or reduced by any actual or alleged concurrent negligence of state or its agents, agencies, employees and officials.

Contractor waives its immunity under Title 51 RCW to the extent it is required to indemnify, defend and hold harmless state and its agencies, officials, agents or employees.

INDEPENDENT CAPACITY OF THE CONTRACTOR - The parties intend that an independent contractor relationship will be created by this contract. The Contractor and his or her employees or agents performing under this contract are not employees or agents of WSSDA. The Contractor will not hold himself/herself out as or claim to be an officer or employee of WSSDA or of the state of Washington by reason hereof, nor will the Contractor make any claim of right, privilege or benefit which would accrue to such employee under law. Conduct and control of the work will be solely with the Contractor.

INDUSTRIAL INSURANCE COVERAGE - The Contractor shall comply with the provisions of Title 51 RCW, Industrial Insurance. If the Contractor fails to provide industrial insurance coverage or fails to pay premiums or penalties on behalf of its employees as may be required by law, Agency may collect from the Contractor the full amount payable to the Industrial Insurance accident fund. WSSDA may deduct the amount owed by the Contractor to the accident fund from the amount payable to the Contractor by WSSDA under this contract, and transmit the deducted amount to the Department of Labor and Industries, (L&I) Division of Insurance Services. This provision does not waive any of L&I's rights to collect from the Contractor.

LICENSING, ACCREDITATION AND REGISTRATION - The Contractor shall comply with all applicable local, state, and federal licensing, accreditation and registration requirements/standards, necessary for the performance of this contract.

LIMITATION OF AUTHORITY - Only the Agent or Agent's delegate by writing (delegation to be made prior to action) shall have the express, implied, or apparent authority to alter, amend, modify, or waive any clause or condition of this Contract. Furthermore, any alteration, amendment, modification, or waiver or any clause or condition of this contract is not effective or binding unless made in writing and signed by the Agent.

NONCOMPLIANCE WITH NONDISCRIMINATION LAWS - In the event of the Contractor's non-compliance or refusal to comply with any nondiscrimination law, regulation, or policy, this contract may be rescinded, canceled or terminated in whole or in part, and the Contractor may be declared ineligible for further contracts with WSSDA. The Contractor shall, however, be given a reasonable time in which to cure this noncompliance. Any dispute may be resolved in accordance with the "Disputes" procedure set forth herein.

NONDISCRIMINATION - During the performance of this contract, the Contractor shall comply with all federal and state nondiscrimination laws, regulations and policies.

OVERPAYMENTS AND ASSERTION OF LIEN - In the event that WSSDA establishes overpayments or erroneous payments made to the Contractor under this contract, WSSDA may secure repayment, plus interest, if any, through the filing of a lien against the Contractor's real property or by requiring the posting of a bond, assignment of deposit or some other form of security acceptable to WSSDA or by doing both.

PRIVACY - Personal information collected, used or acquired in connection with this contract shall be used solely for the purposes of this contract. Contractor and its subcontractors agree not to release, divulge, publish, transfer, sell or otherwise make known to unauthorized persons personal information without the express written consent of WSSDA or as provided by law. Contractor agrees to implement physical, electronic and managerial safeguards to prevent unauthorized access to personal information.

WSSDA reserves the rights to monitor, audit or investigate the use of personal information collected, used or acquired by the contractor through this contract. The monitoring, auditing or investigating may include but is not limited to "salting" by WSSDA. Contractor shall certify the return or destruction of all personal information upon expiration of this contract. Salting is the act of placing a record containing unique but false information in a database that can be used later to identify inappropriate disclosure of data contained in the database.

Any breach of this provision may result in termination of the contract and the demand for return of all personal information. The Contractor agrees to indemnify and hold harmless WSSDA for any damages related to the Contractor's unauthorized use of personal information.

PUBLICITY - The Contractor agrees to submit to WSSDA all advertising and publicity matters relating to this Contract wherein WSSDA's name is mentioned or language used from which the connection of WSSDA's name may, in WSSDA's judgment, be inferred or implied. The Contractor agrees not to publish or use such advertising and publicity matters without the prior written consent of WSSDA.

RECORDS MAINTENANCE - The Contractor shall maintain books, records, documents, data and other evidence relating to this Contract and performance of the services described herein, including but not limited to accounting procedures and practices which sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this Contract. Contractor shall retain such records for a period of six years following the date of final payment. At no additional cost, these records, including materials generated under the Contract, shall be subject at all reasonable times to inspection, review or audit by WSSDA, personnel duly authorized by WSSDA, the Office of the State Auditor, and federal and state officials so authorized by law, regulation or agreement.

If any litigation, claim or audit is started before the expiration of the six (6) year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.

REGISTRATION WITH DEPARTMENT OF REVENUE - The Contractor shall complete registration with the Washington State Department of Revenue and be responsible for payment of all taxes due on payments made under this contract.

RIGHT OF INSPECTION - The Contractor shall provide right of access to its facilities to WSSDA, or any of its officers, or to any other authorized agent or official of the state of Washington or the federal government, at all reasonable times, in order to monitor and evaluate performance, compliance, and/or quality assurance under this contract.

The Contractor shall make available information necessary for Agency 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. The Contractor's internal policies and procedures, books, and records relating to the safeguarding, use, and disclosure of Personal Information obtained or used as a result of this contract shall be made available to Agency and the U.S. Secretary of the Department of Health & Human Services, upon request.

SAFEGUARDING OF INFORMATION - The Contractor shall not use or disclose Personal Information in any manner that would constitute a violation of federal law, 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. The Contractor agrees to comply with all federal and state laws and regulations, as currently enacted or revised, regarding data security and electronic data interchange of all Personal Information.

The Contractor shall protect Personal Information collected, used, or acquired in connection with this Contract, against unauthorized use, disclosure, modification or loss. The Contractor shall ensure its directors, officers, employees, subcontractors or agents use it solely for the purposes of accomplishing the services set forth in this agreement. The Contractor and its Subcontractors agree not to release, divulge, publish, transfer, sell or otherwise make it known to unauthorized persons without the express written consent of AGENCY or as otherwise required by law. The Contractor agrees to implement physical, electronic, and managerial policies, procedures, and safeguards to prevent unauthorized access, use, or disclosure of data in any form. The Contractor shall make the Personal Information available to amend as directed by Agency and incorporate any amendments into all the copies maintained by the Contractor or its Subcontractors.

The Contractor shall certify its return or destruction upon expiration or termination of this Contract and the Contractor shall retain no copies. If the Contractor and Agency mutually determine that return or destruction is not feasible, the Contractor shall not use the Personal Information in a manner other than those permitted or required by state and federal laws.

Agency reserves the right to monitor, audit, or investigate the use of personal information collected, used or acquired by the contractor through this contract. The monitoring, auditing, or investigating may include, but is not limited to, "salting" by Agency. Salting is the act of introducing data containing unique but false information that can be used later to identify inappropriate disclosure of data.

The Contractor shall notify Agency in writing within 5 working days of becoming aware of any unauthorized access, use or disclosure. The contractor will take steps necessary to mitigate any known harmful effects of such unauthorized access including, but not limited to sanctioning employees, notifying subjects, and taking steps necessary to stop further unauthorized access. The Contractor agrees to indemnify and hold harmless Agency for any damages related to unauthorized use or disclosure by the Contractor, its officers, directors, employees, Subcontractors or agents.

Any breach of this clause may result in termination of the contract and the demand for return of all Personal Information.

SAVINGS - In the event funding from state, federal, or other sources is withdrawn, reduced, or limited in any way after the effective date of this contract and prior to normal completion, WSSDA may terminate the contract under the "Termination for Convenience" clause, without the ten day notice requirement, subject to renegotiation at WSSDA's discretion under those new funding limitations and conditions.

SEVERABILITY - The provisions of this contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the contract.

SITE SECURITY - While on Agency premises, Contractor, its agents, employees, or subcontractors shall conform in all respects with physical, fire or other security policies or regulations.

SUBCONTRACTING - Neither the Contractor nor any Subcontractor shall enter into subcontracts for any of the work contemplated under this contract without obtaining prior written approval of WSSDA. In no event shall the existence of the subcontract operate to release or reduce the liability of the Contractor to WSSDA for any breach in the performance of the contractor's duties. This clause does not include contracts of employment between the contractor and personnel assigned to work under this contract.

Additionally, the Contractor is responsible for ensuring that all terms, conditions, assurances and certifications set forth in this agreement are carried forward to any subcontracts. Contractor and its subcontractors agree not to release, divulge, publish, transfer, sell or otherwise make known to unauthorized persons personal information without the express written consent of WSSDA or as provided by law.

TAXES - All payments accrued on account of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the Contractor or its staff shall be the sole responsibility of the Contractor.

TERMINATION FOR CAUSE - In the event WSSDA determines the Contractor has failed to comply with the conditions of this Contract in a timely manner, WSSDA has the right to suspend or terminate this Contract. Before suspending or terminating the Contract, WSSDA shall notify the Contractor in writing of the need to take corrective action. If corrective action is not taken

within 30 days, the Contract may be terminated or suspended. In the event of termination or suspension, the Contractor shall be liable for damages as authorized by law including, but not limited to, any cost difference between the original Contract and the replacement or cover Contract and all administrative costs directly related to the replacement Contract, e.g., cost of the competitive bidding, mailing, advertising and staff time. WSSDA reserves the right to suspend all or part of the Contract, withhold further payments, or prohibit the Contractor from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action by the Contractor or a decision by WSSDA to terminate the Contract. A termination shall be deemed to be a "Termination for Convenience" if it is determined that the Contractor: (21) was not in default; or (2) failure to perform was outside of his or her control, fault or negligence. The rights and remedies of WSSDA provided in this Contract are not exclusive and are in addition to any other rights and remedies provided by law.

TERMINATION FOR CONVENIENCE - Except as otherwise provided in this contract, WSSDA may, by 10 days written notice, beginning on the second day after the mailing, terminate this contract, in whole or in part. If this contract is so terminated, WSSDA shall be liable only for payment required under the terms of this contract for services rendered or goods delivered prior to the effective date of termination.

TERMINATION PROCEDURES - Upon termination of this contract, WSSDA, in addition to any other rights provided in this contract, may require the Contractor to deliver to WSSDA any property specifically produced or acquired for the performance of such part of this contract as has been terminated. The provisions of the "Treatment of Assets" clause shall apply in such property transfer.

WSSDA shall pay to the Contractor the agreed upon price, if separately stated, for completed work and services accepted by WSSDA, and the amount agreed upon by the Contractor and WSSDA for (i) completed work and services for which no separate price is stated, (ii) partially completed work and services, (iii) other property or services which are accepted by WSSDA, and (iv) the protection and preservation of property, unless the termination is for default, in which case the Agent shall determine the extent of the liability of WSSDA. Failure to agree with such determination shall be a dispute within the meaning of the "Disputes" clause of this contract. WSSDA may withhold from any amounts due the Contractor such sum as the Agent determines to be necessary to protect WSSDA against potential loss or liability.

The rights and remedies of WSSDA provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law or under this contract.

After receipt of a notice of termination, and except as otherwise directed by the Agent, the Contractor shall:

1. Stop work under the contract on the date, and to the extent specified, in the notice;
2. Place no further orders or subcontracts for materials, services, or facilities except as may be necessary for completion of such portion of the work under the contract that is not terminated;
3. Assign to WSSDA, in the manner, at the times, and to the extent directed by the Agent, all of the rights, title, and interest of the Contractor under the orders and subcontracts so terminated, in which case WSSDA has the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts.

4. Settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with the approval or ratification of the Agent to the extent Agent may require, which approval or ratification shall be final for all the purposes of this clause;
5. Transfer title to WSSDA and deliver in the manner, at the times, and to the extent directed by the Agent any property which, if the contract had been completed, would have been required to be furnished to WSSDA;
6. Complete performance of such part of the work as shall not have been terminated by the Agent; and
7. Take such action as may be necessary, or as the Agent may direct, for the protection and preservation of the property related to this contract which is in the possession of the Contractor and in which WSSDA has or may acquire an interest.

TREATMENT OF ASSETS -

- A. Title to all property furnished by WSSDA shall remain in WSSDA. Title to all property furnished by the Contractor, for the cost of which the Contractor is entitled to be reimbursed as a direct item of cost under this contract, shall pass to and vest in WSSDA upon delivery of such property by the Contractor. Title to other property, the cost of which is reimbursable to the Contractor under this contract, shall pass to and vest in WSSDA upon (i) issuance for use of such property in the performance of this contract, or (ii) commencement of use of such property in the performance of this contract, or (iii) reimbursement of the cost thereof by WSSDA in whole or in part, whichever first occurs.
- B. Any property of WSSDA furnished to the Contractor shall, unless otherwise provided herein or approved by WSSDA, be used only for the performance of this contract.
- C. The Contractor shall be responsible for any loss or damage to property of WSSDA which results from the negligence of the Contractor or which results from the failure on the part of the Contractor to maintain and administer that property in accordance with sound management practices.
- D. If any Agency property is lost, destroyed or damaged, the Contractor shall immediately notify WSSDA and shall take all reasonable steps to protect the property from further damage.
- E. The Contractor shall surrender to WSSDA all property of WSSDA prior to settlement upon completion, termination or cancellation of this contract.
- F. All reference to the Contractor under this clause shall also include Contractor's employees, agents or Subcontractors.

U.S. DEPARTMENT OF TREASURY, OFFICE OF FOREIGN ASSETS CONTROL - WSSDA complies with U.S. Department of the Treasury, Office of Foreign Assets Control (OFAC) payment rules. OFAC prohibits financial transactions with individuals or organizations, which have been placed on the OFAC Specially Designated Nationals (SDN) and Blocked Persons sanctions list located at <http://www.treas.gov/offices/enforcement/ofac/index.html>. Compliance with OFAC payment rules ensures that WSSDA does not conduct business with individuals or organizations that have been determined to be supporters of terrorism and international drug dealing or that pose other dangers to the United States.

Prior to making payment to individuals or organizations, WSSDA will download the current OFAC SDN file and compare it to agency and statewide vendor files. In the event of a positive match, WSSDA reserves the right to: (1) make a determination of "reasonability" before taking the positive match to a higher authority, (2) seek assistance from the Washington State Office of the State Treasurer (OST) for advanced assistance in resolving the positive match, (3) comply with an OFAC investigation, if required, and/or (4) if the positive match is substantiated, notify the contractor in writing and terminate the contract according to the Termination for Convenience provision without making payment. WSSDA will not be liable for any late payment fees or missed discounts that are the result of time required to address the issue of an OFAC match.

WAIVER - Waiver of any default or breach shall not be deemed to be a waiver of any subsequent default or breach. Any waiver shall not be construed to be a modification of the terms of this Contract unless stated to be such in writing and signed by authorized representative of WSSDA.