

**Skagit County Government**  
**Request for Proposal**  
**for Electronic Mail Security System**



January 9, 2023

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## **1 INTRODUCTION**

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified Proposers to provide Skagit County with an Electronic Mail Security System ("EMSS") . The ideal Proposer will be an established industry-recognized solution for the EMSS that meets Skagit County's specific requirements, as documented in this RFP and within the budget available to Skagit County.

For the purposes of this document, the words "response" or "proposal" shall mean the Proposer's submitted response to Skagit County's RFP, inclusive of any materials identified as exhibits.

The term RFP shall be used to identify this document.

### **1.1 *Background***

Skagit County has been using an electronic mail filtering system for several years and wishes to upgrade to a software-as-a-service solution and move away from our on-premise technology.

## **2 PROJECT OVERVIEW**

The scope of this project is to identify, select, contract with, and engage a Proposer who provides an EMSS solution that meet specific functional and mandatory requirements defined in Section 6, PROJECT REQUIREMENTS.

Following is the general project scope, for informational purposes only.

Compliant with Center for Internet Security (CIS) Controls Version 8

### **2.1 *Project Goals***

The primary business goals that we hope to achieve with this EMSS solution include:

- Significantly reduce the work to accurately detect and remediate hostile electronic mail in real time.

#### **Reports**

- Easily create custom reports using information available in the system
- Have the capability to identify top-at-risk users

#### **System Attributes**

- Intuitive user interface
- Fast, easy searching and data entry
- Integration with Microsoft Exchange Online
- Shall have the capability of issuing alerts based on defined events

## 2.2 Project Budget

Skagit County has budgeted \$75,000 per year for implementation of the EMSS solution. This cost includes third party software, professional services, license costs, subscription costs and/or hardware as required.

The budget includes ALL costs that would be invoiced prior to the date the County goes “live” on the system. Third party expenses, such as third-party software would be part of this budgeted cost.

## 2.3 Communications

It is the responsibility of the Proposer to read and understand all parts of the Request for Proposals. All communications regarding this Request for Proposals from Proposers and other interested parties must be directed through:

Michael Almvig  
Skagit County Information Services  
1800 Continental Place  
Mount Vernon, WA 98273  
(360) 416 - 1101  
E-MAIL: [rfp@co.skagit.wa.us](mailto:rfp@co.skagit.wa.us)

The individual identified above is the sole point of contact for any inquiries or information pertaining to this RFP.

Proposers who request a clarification of the RFP requirements may submit written questions to the RFP contact person by **3:30 p.m. (PST) on January 23, 2023**. All questions and responses will be provided to all Proposers who have submitted a letter of intent pursuant to section 3.1 and 3.2. Skagit County reserves the right to update RFP requirements. Skagit County will use electronic mail and our Access Skagit County Web site, [www.skagitcounty.net/rfp](http://www.skagitcounty.net/rfp), to notify Proposers of RFP questions, answers and/or changes.

Due to a high volume of spam, questions to the RFP submitted by electronic mail are to include:

**“Skagit County EMSS RFP Questions”** in the Subject area of the electronic message.

Skagit County assumes no responsibility for unanswered questions without the correct information in the subject line or delays caused by delivery service.

## 2.4 Project Strategy

### 2.4.1 Shared Services Approach

Skagit County plans to take a shared services approach. This means that the Proposer trains County staff how to configure the application and then County staff performs the configuration of most case types/workflows.

### **3 PROPOSAL INSTRUCTIONS, CONTENT AND SUBMISSION**

#### ***3.1 Schedule***

This request for proposals will be managed according to the following schedule:

Proposals Available on Skagitcounty.net	January 10, 2023
Deadline for Proposer Letter of Intent	January 23, 2023 3:30 PM (PST)
Deadline for Proposer Questions	January 23, 2023 3:30 PM (PST)
Deadline for Response to Proposer Questions	January 26, 2023 4:30 PM (PST)
Deadline for receiving Proposer's Proposal	February 2, 2023 3:30 PM (PST)
Anticipated Proposer Notification	February 28, 2023
Anticipated Final Proposer Selection	March 17, 2023

#### ***3.2 Letter of Intent***

All Proposers intending on submitting a proposal to this RFP are **required** to submit a letter of Intent to bid no later than **3:30 PM (PST) on January 23, 2023**. The letter should identify the following information:

Company Name  
RFP Contact for Company  
Address for Company Contact  
Phone Number/Fax Number for Company Contact  
E-mail address for Company Contact

The Letter of Intent must be electronically mailed. The letter does not commit the Proposer to respond to the RFP. All Proposers who have submitted a letter of intent will receive notification of proposal changes or responses to questions submitted by other competitors.

Electronic mail letter of intent shall be sent to **rfp@co.skagit.wa.us**. Once your letter of intent is received you will receive a confirmation via electronic mail. Each letter of intent shall identify the electronic submission by submitting the proposal with the phrase:

**"Skagit County EMSS RFP Letter of Intent"** in the Subject area of the electronic message.

#### ***3.3 Request for Proposal Documents***

The Proposer should make sure that they have all of the documents listed below before starting on their proposal to Skagit County.

<b>Exhibit</b>	<b>File Name</b>
The Request for Proposal Document	2022 Email Filtering System RFP.docx
Requirements Spread Sheet	Requirements.xlsx
Cost Evaluation Spread Sheet	S12 – Cost Proposal.xlsx

*Table 1, Proposal Documents*

### 3.4 Submission of Proposal

#### 3.4.1 Submission Deadline

***All Proposer responses and proposals must be received no later than 3:30 PM (PST) on February 2, 2023.***

Late or incomplete proposals may be rejected. Proposers should note that this is a firm deadline.

#### 3.4.2 Submission

All proposals MUST be sent by electronic mail to **rfpproposal@co.skagit.wa.us** and must be time stamped by Skagit County's system as received as specified in section 3.1. Once your proposal is received you will receive a confirmation via electronic mail. Each submitted proposal shall identify the electronic submission by submitting the proposal with the phrase:

**"Skagit County EMSS RFP Response"** in the Subject area of the electronic message.

Skagit County assumes no responsibility for delays caused by delivery service.

#### 3.4.3 Copies

All responding Proposers shall submit one (1) original response of their response to this Request for Proposals. The electronic version is to be considered the original.

#### 3.4.4 Proposal Materials

Proposals must be in Microsoft Word O365 or higher or Adobe PDF format (with Microsoft Excel attachments remaining in their native formats).

### 3.4.5 PROPOSER RESPONSE CHECKLIST

This checklist is provided for the Proposer's convenience to ensure that all required materials are included in the Proposer's response.

Form Name		
Cover Letter		
Company Information Form – Form A		
Company Background Information – Form A		
Company Experience – Form A		
Company Contact Information – Form A		
Anticipated Project Manager Information – Form A		
Customer Reference 1 – Form B		
Customer Reference 2 – Form B		
Customer Reference 3 – Form B		
Project Schedule and Implementation Timeline – Form C		
Optional Features – Form D		
Narrative Questions – Form E		
Training Plan – Form F		
New Version Upgrade Costs – Form G		
Signed Proposer's Certification and Formal Offer of Proposal – Form H		
Section 6 – Requirements – "Requirements.xlsx"		
Section 12 Cost Proposal - S12 – Cost Proposal.xlsx		
Supplemental Proposer Responsibility – Declaration of Proposer		

*Table 2, Proposer Response Checklist*

### 3.4.6 Legibility and Organization

Proposals must be typed or printed, must be written in English and must be legible and reasonably organized. Pages must be consecutively numbered. Responses must mirror the numbering order used throughout this RFP.

## 4 RFP AND PROPOSAL TERMS AND CONDITIONS

### 4.1 *Right to Withdraw Proposals*

Proposals may be withdrawn at any time before proposal deadline.



#### *4.2 Right to Reject/Accept Proposals*

Skagit County reserves the right to accept any proposal or, at its discretion, reject any or all proposals.

#### *4.3 County Rights and Options*

In addition to the other terms and rights in this Request for Proposal, Skagit County reserves, holds and may exercise at its sole and absolute discretion the following rights and options without recourse to the County:

- a. Supplement, amend, withdraw, and/or otherwise modify or cancel this Request for Proposals, without liability, and with or without substitution of any other request for Proposals;
- b. Issue additional or subsequent solicitations for Proposals;
- c. Conduct investigations of the Proposers and their Proposals;
- d. Clarify the information provided pursuant to this Request for Proposals;
- e. Request additional evidence or documentation to support the information included in any Proposal;
- f. Reject individual proposals not meeting minimum requirements including bidder responsibility, insurance requirements or other functionality stated in this Request for Proposal document;
- g. County has the right to reject or accept any optional component [HD, D] or module proposed by the Proposer.

#### *4.4 Right to Modify Proposals*

Skagit County reserves the right to, but is not obligated to in its sole and absolute discretion to modify or accept minor irregularities in proposals received.

If discrepancies between sections or other errors are found in a proposal, Skagit County may reject the proposal. Proposers are responsible for all errors or omissions in their proposals, and any such errors or omissions will not serve to diminish Proposers obligations to Skagit County.

#### *4.5 Skagit County Not Responsible for Proposal Expenses*

Receipt of a proposal does not obligate Skagit County to pay any expenses incurred by the Proposer in the preparation of proposal or obligate Skagit County in any other respect.

#### *4.6 Proposals Do Not Obligate*

Neither the publication nor distribution of the RFP, or the receipt of proposals, constitutes any obligation or commitment on the part Skagit County.

#### *4.7 Right to Accept/Deny Single Proposal*

Skagit County reserves the right to accept or deny a single proposal if only one proposal is submitted.

#### *4.8 Submittal of Multiple Proposal*

A Proposer may only submit one proposal.

#### *4.9 Non-endorsement*

As a result of the selection of a Proposer to supply products and/or services to Skagit County, Skagit County is neither endorsing nor suggesting that the Proposer's product is the best or only solution. The Proposer

agrees to make no reference to Skagit County in any literature, promotional material, brochures, sales presentation or the like without the express written consent of Skagit County.

#### *4.10 Proprietary Information/Public Disclosure*

All materials received in response to this RFP shall become the property of Skagit County. No confidential or proprietary information may be submitted to the County in response to this RFP.

All information submitted to Skagit County shall be treated as open public records regardless of how the information or document is marked.

By submitting a proposal, all Proposers recognize and agree that any proposal, information, documents, data, etc. provided in response to this RFP to the County is subject to disclosure pursuant to applicable law (including, but not limited to RCW 42.56), and any Proposer submitting a proposal expressly waives any claim(s) for damages against the County arising from and/or related to the release of any information provided to the County which is subject to public disclosure (as determined by the County, at the County's sole judgment and discretion), even if such information is marked confidential, proprietary or non-disclosable, or arguably exempt from disclosure pursuant to applicable law.

## 5 PROPOSAL EVALUATION

The proposals will be evaluated by a team of people from Skagit County. The Skagit County EMSS Team includes the Information Services staff. Other staff from other departments may participate if needed to complete evaluations. Skagit County will initially check each submitted proposal to validate all required forms are included in Proposer's Response. Absence of required information may be cause for rejection.

For the purposes of this document, "Evaluation Team" shall mean any Skagit County employee who participates in any part of the evaluation process.

The Proposer shall fully complete the Requirements spreadsheet that contain both Minimum and other Functional Requirements. Each tab of the sheet corresponds to a functional area for review.

Tab Name	Description
Minimum	Minimum Functional Requirements - Section 6.0
6.1	Reporting/Dashboard Requirements - Section 6.1
6.2	Search - Section 6.2
6.3	Alerts - Section 6.3
6.4	Security - Section 6.4
6.5	General Requirements - Section 6.5
6.6	Network Infrastructure - Section 6.6

*Table 3, Requirements Section in Requirements spread sheet – to be filled out by Proposer*

### 5.1 Evaluation Criteria

The Evaluation Team will review all elements in the table below for all Proposers who have submitted accepted proposals. An accepted proposal shall be a proposal that was submitted prior to the deadline for receiving proposals AND includes the mandatory forms.

Evaluation Criteria	Evaluation Determination
Minimum Functional Requirements <b>(Must comply with all requirements)</b>	Pass or Fail
Signed Proposer's Certification and Formal Offer of Proposal <b>(Must comply)</b>	Pass or Fail
Functional Requirements – Section 6.1 – 6.6	Team Evaluation
Experience (Form A, B)	Team Evaluation
Project Timeline (Form C)	Team Evaluation
Narrative Questions (Form E)	Team Evaluation
Training Plan (Form F)	Team Evaluation
New Version Upgrade Costs (Form G)	Team Evaluation
Proposal within County Authorized Budget	Pass or Fail
Optional Demonstrations at County's Discretion	Team Evaluation
Customer Service Portal	Team Evaluation
Overall State of Technology Review	Team Evaluation

*Table 4, Evaluation Criteria*

Any Proposer that does not meet the Minimum Functional Requirements, has not provided a signed Proposer Certification or Signed Proposer's Certification and Formal Offer of Proposal (Form H) or is not within the County Budget will be eliminated from the evaluation process.

Proposals that are not eliminated will be evaluated by the Evaluation Team. All items marked "Team Evaluation" in table 4, will be evaluated using the criteria as follows for each criteria.

1. Does not meet expectations
2. Meets expectations
3. Exceeds Expectations

The proposal that has the highest score and meets all of the minimum requirements will be forwarded to the Board of County Commissioners for acceptance.

#### 5.1.1 Proposer Demonstrations

Skagit County reserves the right to require testing of any functionality, Skagit County reserves the right to request a demonstration of the system proposed. All such demonstrations will 1) Verify that all of the minimum requirements are implemented in the system and 2) perform an assessment of the functional capabilities of the system in supporting Skagit County's business needs.

#### 5.1.2 Optional Features

Optional Features (Form D) will not be scored. Optional features will be incorporated into any contract if the County wishes to implement such features. County is under no obligation to procure optional features offered.

#### 5.1.3 No Proposal Meets All Minimum Requirements

In the unlikely event that no Proposer meets all of the minimum functional requirements, Skagit County shall have the discretion, but is not required, to evaluate proposals that DO NOT meet all of the minimum functional requirements and waive minimum requirements in order to move proposal(s) into the evaluation phase..

### 5.2 *Negotiations*

Skagit County will enter into negotiations with the Proposer approved by the Board of County Commissioners, as providing the best solution in Skagit County's sole discretion. This may include cost, technical, financial, contractual or other clarifications needed to make a decision. Skagit County reserves the right to also negotiate with the other top rated Proposers in the event it is determined by Skagit County that the selected Proposer and Skagit County cannot agree to contracting terms.

## 6 PROJECT REQUIREMENTS

This response is mandatory. Project requirements are in the spreadsheet titled "Requirements.xlsx". Section 6.0 contains Minimum Requirements of the system. Sections 6.1 – 6.6 contain additional functional requirements or requests for additional information.

### 6.1 Minimum Functional Requirements – Section 6.0

The Proposer shall place a **Y** or **N** in the column marked Y/N.

**Y** – Shall mean that the proposed solution meets the minimum requirement with current capabilities. No further system development is required. Systems that meet the requirement through current available configuration capabilities are considered in compliance.

**N** – Shall mean that the Proposer does not meet the minimum requirement with current software capabilities.

Figure 1, below provides an example of how Skagit County would like to have the Minimum Functional Requirements Form filled out by the Proposer.

Minimum Functional Requirements - Section 6.0				
	Requirement	Requirement Level	Y/N	Proposer Response To Requirement
Reporting - Section 6.1				
1	Provide capability for customers to make an online Electronic Payment.			
a	Customer shall be able to make an online payment using a credit card	MR	Y	Our system accepts credit card payments using several different payment providers.

The Proposed systems accepts Credit Cards, so a "Y" is placed in this column.

The Proposer provides additional clarification on how the system meets the requirements

**Figure 1, Sample of table filled out for section 6.0**

Proposer should fill out only the section as shown in yellow above. It is requested that Proposers add additional information on how the system meets the requirement in the "Proposer Response to Requirement" section. If the row contains an **"MR"**, then a **"Y"** or **"N"** must be placed in the correct column in order to be compliant.

### 6.2 Functional Requirements – Section 6.1 – 6.6

Each Proposer shall review the functional requirements and identify if the proposed system meets the requirement using the rating key below. The rating shall be provided by the Proposer and will be evaluated by the Skagit County evaluation team.

### **Rating Key**

**4** – Out of the box – Shall mean that the functionality exists within the Proposers currently available solution.

**3** – Meets with Configuration – Shall mean that the functionality is within a currently installed system, but must be configured for proper operations.

**2** – Meets via an upcoming release < 1year – Shall mean that the functionality is not currently implemented in the system but will be released within one year of receipt of the submitted proposal.

**1** – Requires customization to meet – Shall mean that the functionality does not currently exist within the proposed system and will require customization in order to meet the requirement.


**0** – Cannot meet this requirement. – Shall mean that the system does not meet the requirement and there is no plan to do so.

Requirements in sections 6.1 – 6.6 are functional requirements that we would like to see in the system, but not necessarily something that must be implemented. We have also rated each requirement to identify a level of importance using the following table.

Requirement Level	Definition
HD	Highly Desirable
D	Desirable
O	Optional – This requirement should be bid as an option
I	Information – We would like the Proposer to expand on the question.

***Table 5. Requirements Level Definitions***

Table 5 shows an example of how we would like the functional sections 6.1 – 6.6 to be filled out. Using Table 5 above, the Proposer shall identify if their proposed system meets the using the rating key. The Proposal can provide additional information in the Proposer Response section. If the requirement level is marked “I”, then it is expected that the Proposer will provide further information to respond to the question that is asked.



System Interfaces- Section 6.7					
	Requirement		Requirement Level	Ability to Meet Requirement 4 = Out of box 3 = Meets with configuration 2 = Meets via upcoming release <1yr 1 = requires customization to meet 0 = Can't Meet	Proposer Response To Requirement
1		The system shall be able to accept and send data in Extensible Markup Language (XML), Comma-Separated Values (CSV) or JSON formats	HD	4	We support all formats listed.
2		How often do you backup the database?	I	NA	We backup the database daily.

For functional requirements, the vendor shall identify the ability to meet the requirement using the rating key above, for Informational requirements the vendor should provide additional information as requested.

**Figure 2, Sample of table filled out for section 6.1 – 6.6**

Only the columns in yellow, as shown, are to be filled in by the Proposer. If the requirement level is Informational {"I"}, then the Ability to Meet the Requirement section should be "NA" for not applicable. The vendor is expected to answer the question in the Proposer Response to Requirement section. Each section 6.1-6.6 will be evaluated per section 5.1 "Evaluation Criteria". Proposer's answers to informational questions will be used for Proposer scoring.

### 6.3 Project Metrics

The following metrics are to assist Proposers in filling out the requirement sheets.

#### 6.3.1 Number of Administrative Users

Administrative users are those employees that have the rights to administrate the system. Skagit County estimates we would have 2 – 5 administrators depending on what administrative functions are available in the system.

## 7 PROJECT SCHEDULE AND IMPLEMENTATION TIMELINE

**Complete the attached Form C, Project Schedule and Implementation Timeline.**

The Proposer shall provide a projected schedule and implementation plan. The plan is to include:

- A Gantt chart showing beginning and end dates of all project tasks and deliverables (the actual project start date will be determined during contract negotiations)
- A description of each proposed deliverable

- Skagit County Information Services assigned tasks with estimated hours to complete.

## **8 OPTIONAL FEATURES**

### **Optional: Complete the Form D, Optional Features.**

Proposers are encouraged to not only respond to the functional requirements, but to offer information on additional EMSS solution options/features available with their solutions that would be of benefit/interest to Skagit County.

## **9 NARRATIVE QUESTIONS**

### **Complete the Form E, Narrative Questions.**

Proposer is to provide responses to the narrative questions. These responses are intended to educate us as to how your EMSS solution addresses certain business problems and/or provide more insight into current administration and future direction of your solution.

## **10 TRAINING PLAN**

### **Complete the Form F, Training Plan.**

The Proposer shall provide a training plan that covers on-site and/or remote training. A final plan will be created with the winning proposer and incorporated into a contract. Skagit County plans to use a Train the Trainer approach, so that County staff will have the skills to train others in use of the system.

This plan shall identify:

- Training Skagit County employees on how to use system
- Scope and Objectives for each training session
- The number of hours/days for staff training
- Estimated duration of each session
- Additional training available

Training materials as necessary shall be delivered to Skagit County.

Skagit County prefers that training be done on-site if possible.

### ***10.1 Training Facilities***

Skagit County does not have a dedicated training facility. If onsite training is recommended, the Proposer shall identify the needs for the training facility in Form F. This should include number of students, laptops or workstations required, projection needs, etc.

The Proposer may propose that training be done remotely, Skagit County uses Microsoft Teams, however, other platforms are acceptable.



## **11 DATA CONVERSION PLAN**

No data will be converted for this project.

## **12 COST PROPOSAL**

**Complete S10 – Cost Proposal.xlsx.**

### *12.1 Cost of Proposal*

The Skagit County Evaluation team will conduct a full five-year cost analysis of the Proposal. Proposers are required to use the Cost Proposal spread sheet to ensure recurring and non-recurring costs are accounted for. If different cost configurations are presented, as an example one year verse a three-year support plan; please enter into different spread sheets.

Please itemize the total cost of implementation by function or phase to implement the proposed solution including: project management, configuration and any customization development to support your responses on the EMSS Requirements worksheet, data conversion, system testing, deployment, and both end-user and system administrator training. Please include any travel and expenses estimated costs.

### *12.2 New Version Upgrade Costs*

**Complete the Form G, New Version Upgrade Costs.**

If your system requires professional services to implement software upgrades, then a statement is required giving estimated upgrade and cost information.

## **13 ACCEPTANCE AND GO-LIVE**

Skagit County and Proposer shall validate that the system meets the minimum requirements as specified within this RFP as part of the acceptance process.

Unless waived by the Skagit County Project Manager, each minimum requirement shall be tested for acceptance.

Skagit County and Proposer shall sign an acceptance document that minimum requirements requirements have been tested and meet acceptance expectations as part of the exit criteria for these steps.

Final payment and start of software support or assurance shall not be made until after acceptance by Skagit County. The acceptance test will be considered complete when the acceptance test document, which has been agreed to by both parties, is accepted by both parties.

*Note: No response is needed at this time. This is a contractual item and will be negotiated with the proposer which is selected as the apparent winner.*

### *13.1 Other Milestones*

Proposer and County may add other milestones and deliverable items as needed to facilitate successful implementation of the system.

## 14 **SKAGIT COUNTY PROPOSAL FORMS**

All forms must be filled out and submitted as part of the RFP materials. Proposer is to use referenced forms to provide requested information. If you run out of space, you may attach additional sheets; however, you must clearly identify the form(s) and each form must be on its own sheet.

### 14.1 *FORM A – Company Information*

The Company Information Form asks specific information about the company. Our intent is to verify the viability of the company to support Skagit County for the next several years.

<b>Company Information</b>	
Company Name:	
Address:	
City, State Zip	
FAX Number	

<b>Company Background Information</b>	
Organizational Type/Structure:	
Date Incorporated	
Number of employees:	
<b>Company Experience</b>	
Years Proposer has conducted business in Washington State:	
Number of systems Installed, with focus on institutions of similar scale to Skagit County:	

Is there any pending litigation against the firm? Has there been any litigation against the firm in the last 3 years?	
If so, attach a statement indicating the caption, cause number, Court, Counsel, and general summary.	

Company Contact Information	
Contact Name:	
Address:	
City, State Zip	
Phone Number	
E-Mail Address	
Web Site URL	

Anticipated Project Manager Information	
Contact Name:	
Phone Number	
E-Mail Address	
Years' Experience	
Number Employees Working Under Project Manager	

## 14.2 FORM B - References

Provide at least 3 customer references relevant to the scope of this contract. A brief description of the work performed must be provided for each reference. More than three references may be provided. For additional references, please add additional sheets with the requested information in the same format as shown below.

Customer Reference (1) Information:	
Institution Name:	
Address:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact Email Address:	
Number of Years as Customer:	
Size of System:	
Year Installed:	
Additional Relevant Information:	

Customer Reference (2) Information:	
Institution Name:	
Address:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact Email Address:	
Number of Years as Customer:	
Size of System:	
Year Installed:	
Additional Relevant Information:	

Customer Reference (3) Information:	
Institution Name:	
Address:	
Contact Name:	
Contact Title:	
Contact Phone Number:	
Contact Email Address:	
Number of Years as Customer:	
Size of System:	
Year Installed:	
Additional Relevant Information:	

### 14.3 FORM C – Project Schedule and Timeline

Please provide a basic timeline for implementation of your proposed solution.

#### Gantt Chart

Use this section to include your Gantt chart showing beginning and end dates of all tasks.

#### Deliverables

Use this section to include brief descriptions of all project deliverables.

#### Skagit County Information Services Project Team Effort

Use this section to describe the roles and quantify the effort that will be required from Skagit County Information Services staff to contribute to the implementation effort.

#### 14.4 FORM D – Optional Features

Please use the space provided to describe any additional features or options that you feel may be relevant to this proposal. Include availability, limitation and extra cost. ***Please include those items in the cost proposal as separate line items under Optional Features. (S10 – Cost Proposal.xlsx under)***

As part of the optional features, please describe the following:

1. Are there other features that your system provides that Skagit County should consider as part of the procurement?

Optional Feature Description (add cost to S10 – Cost Proposal.xlsx under Optional features)



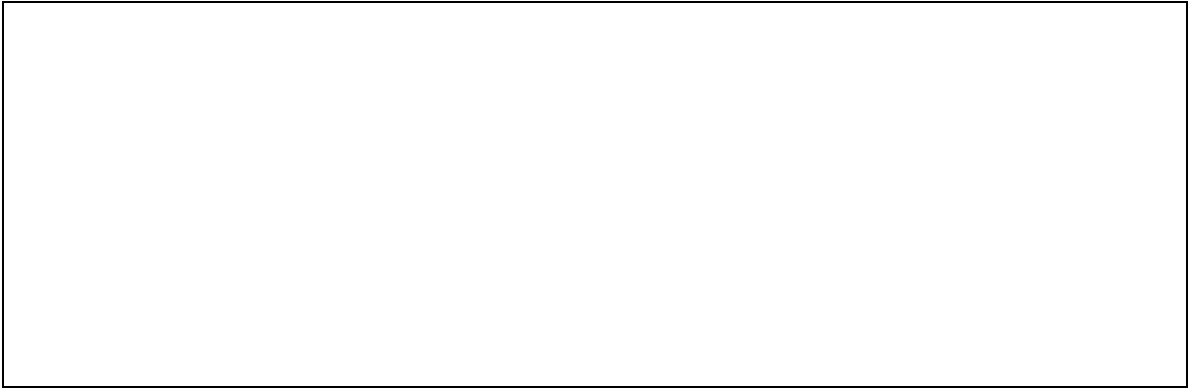
## 14.5 FORM E – Narrative Questions

### Narrative Questions

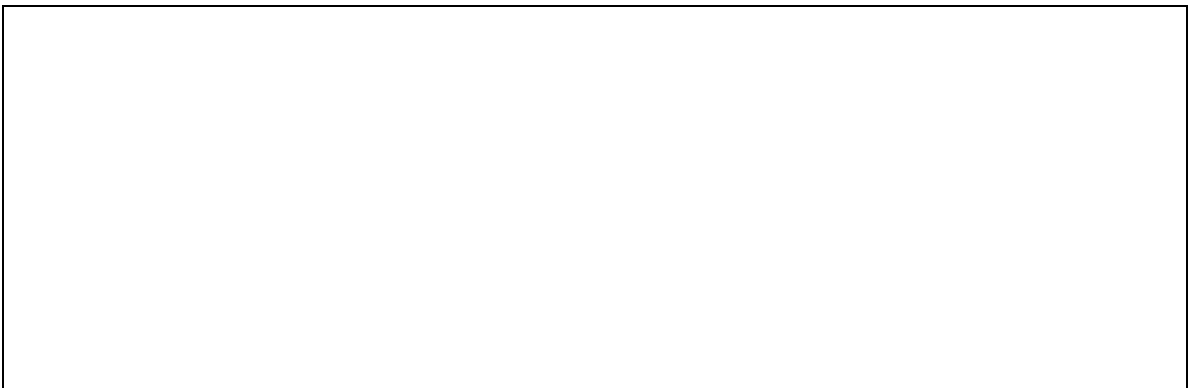
Provide your narrative responses to the following questions in the space provided. If you need more room than is provided, please use an extra sheet and include the Form letter, title, question number and the question on the attachment.

1. Describe your system's ability to create comprehensive reports.

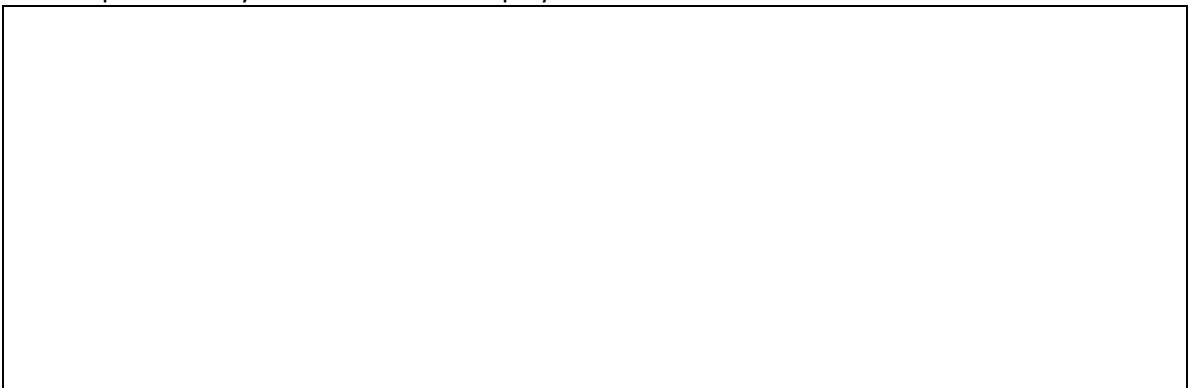
2. Describe your solution's overall roadmap for the next 1, 3, and 5 years.



3. Describe and ideally include a graphical representation of the solution deployment architecture that you would recommend to optimize system performance for the anticipated number of system users and within your proposed pricing. Proposer may add this as an attachment, but be sure to label by Form Name, question number and question.



4. Describe the administrative Full Time Employees (FTE) required (for day-to-day operation, system patching, minor upgrades, etc.) and the daily, weekly, and monthly tasks that the administrator(s) should expect to carry out for a solution deployment of our size.



5. Describe your technical support process and hours of support. Describe what happens if the County has a major incident with your solution after hours.

6. Describe any user groups, wikis, online forums, knowledge base access, etc. that are available to your customers. Describe which ones are available to your prospective customers to help with their pre-purchase due diligence.

7. Describe the user help and support documentation that is available for your solution. Where possible, provide us with an example as an attachment.

#### 14.6 FORM F – Training Plan

The Proposer shall describe in detail your user and administrator training approach and tools.

Training Plan

#### 14.7 FORM G – New Version Upgrade Costs

Please use the space below to provide a statement below estimating the number of upgrades that will happen over the next five years and the estimated professional services costs associated with each upgrade. Proposers must clarify what constitutes a paid upgrade verses what is included in the yearly support and maintenance contract.

New Version Upgrade Costs

#### 14.8 FORM H – Proposer’s Certification and Formal Offer of Proposal

By signing and dating below, the Proposer affirms that they read the Request for Proposal and agree to the terms and that the information provided in this proposal response and any included materials are true and correct, and that by signing, the signer certifies that he or she is authorized to enter into agreements on behalf of the Proposer.

Do you certify that you are not on the Comptroller General’s list of ineligible contractors nor the list of parties excluded from Federal procurement or non-procurement programs? Yes ☐ No ☐

THE UNDERSIGNED have hereunto set their hands or caused their duly authorized officers to submit this proposal, all as of the \_\_\_\_ day of \_\_\_\_\_, 2023.

By signing below, you certify in writing that all Proposer proposal terms, including prices, will remain in effect for a minimum of 180 days after the Proposal Due Date, that all proposed hardware and system software has been operational at a non-Proposer owned customer site for a period of 90 days prior to the Proposal Due Date, and that all proposed capabilities can be demonstrated by the Proposer.

Additionally, you certify that all information provided within this proposal response is accurate.

Person duly authorized by company to submit and certify this proposal (print name:)

\_\_\_\_\_

Signature: \_\_\_\_\_

DATE \_\_\_\_\_

Proposer agrees that submission of this proposal to Skagit County, with a duly authorized officer or representative named above constitutes a binding agreement by Proposer to Skagit County to preserve the price submitted for 180 days. Skagit County will accept a named individual in lieu of a signature so that this document can be electronically submitted (provided that a signed printed proposal shall be provided by the County upon request by the County). Proposer agrees that changing the proposal cost within this 180-day period may void the proposal response by the Proposer and Skagit County may eliminate the proposal from further evaluation.

### SUPPLEMENTAL PROPOSER RESPONSIBILITY – DECLARATION OF PROPOSER

In accordance with the Contract Provisions Proposer must provide the following sworn statement relevant to Exhibit A - Proposer Responsibility applicable to the project.

Name of Proposer: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone No. \_\_\_\_\_  
E-Mail: \_\_\_\_\_

I, the undersigned declarant, as the duly authorized representative on behalf of (herein the "Proposer") hereby make this declaration on the basis of facts within the scope of my firsthand knowledge and authority to which I am competent to testify:

1. I hereby certify, swear, and affirm under penalty of perjury, that the Proposer has not been convicted of a crime involving bidding on a contract within the five (5) year period immediately preceding the bid submittal deadline for the project; and
2. I hereby certify, swear and affirm under penalty of perjury, that the Proposer has not had any contracts terminated for cause by any State, Federal, or local government agency during the five (5) year period immediately preceding the bid submittal deadline for the project.
3. I hereby certify, swear and affirm under penalty of perjury, that the Proposer meets all requirements and conditions set forth in the Supplemental Proposer Responsibility.
4. I hereby certify, swear and affirm under penalty of perjury, that the Proposer meets all requirements and conditions set forth in the Request for Bid for PDCM solution Proposer Responsibility Exhibit A. (Please see Paragraph C. of Exhibit A.)

Signed under penalty of perjury under the laws of the State of Washington this \_\_\_\_\_ day of \_\_\_\_\_, 2023 at \_\_\_\_\_.

Name of Proposer: \_\_\_\_\_  
By: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Title: \_\_\_\_\_



STATE OF WASHINGTON     )  
  )ss.  
COUNTY OF SKAGIT)

I certify that I know or have satisfactory evidence that \_\_\_\_\_ is the person who appeared before me, and said person acknowledged that he/she signed this instrument, on oath stated that he/she was duly authorized that he/she signed this instrument, on oath stated that he/she was duly authorized execute the instrument and acknowledged it as the \_\_\_\_\_ of \_\_\_\_\_ to be free and voluntary act of such party for the uses and purposes herein mentioned.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2023.

(SEAL)

\_\_\_\_\_  
Notary Public

Print name: \_\_\_\_\_

Residing at: \_\_\_\_\_

My commission expires: \_\_\_\_\_

PRIOR EXPERIENCE/QUALIFICATIONS

Proposer: \_\_\_\_\_  
(Type or Print Company Name)

I, Proposer shall indicate in detail below prior experience/qualifications with development of Electronic Mail Security Systemsoftware including number of continuous years in the business of developing Electronic Mail Security System solutions similar to the system specified herein and all additional requirements set forth in the Exhibit A – Proposer Responsibility.

By signing below, I hereby certify that the above information is true and correct,

Proposer Signature: \_\_\_\_\_ Date \_\_\_\_\_

## **Exhibit A – PROPOSER RESPONSIBILITY**

Request for Bid for PDCM solution Proposer Responsibility.

- A. Proposers must meet the minimum qualifications listed below:
  - a. Have a current Washington unified business identifier number.
  - b. If applicable, have industrial insurance coverage for the Proposer's employees working in Washington as required in Title 51 RCW; an employment security department number as required in Title 50 RCW; and a Washington excise tax registration number as required in Title 82 RCW; and
  - c. Not be disqualified from bidding on any public contract under RCW 39.06.010 or 39.12.065(3).
- B. In addition to the Proposer responsibility criteria above, the Proposer must also meet the following relevant supplemental Proposer responsibility criteria applicable to the project:
  - a. The Proposer shall not currently be debarred or suspended by the Federal Government. The Proposer shall not be listed as a current debarred or suspended Proposer on the U.S. General Services Administration's "Excluded Parties List System" website. Proposer debarment or suspension status may be verified through this website. County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with these criteria. Proposer must also assure that any subcontractor working or supplying materials related to the work contemplated under the request for bids must not be currently debarred by the Federal Government.
  - b. The Proposer shall not owe delinquent taxes to the Washington State Department of Revenue, without a payment plan approved by the Washington State Department of Revenue. The Proposer shall not be listed on the Washington State Department of Revenue's (DOR) "Delinquent Taxpayer List", which may be verified at the DOR website. The County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
  - c. The Proposer shall not have been convicted of a crime involving bidding on a public contract within five (5) years prior to the bid submittal deadline. The Proposer shall provide a duly executed sworn statement (on the included form, or on a form otherwise determined to be acceptable by the County), that the Proposer has not been convicted of a crime involving bidding on a public contract. The County may also use independent sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
  - d. The Proposer shall not have a record of prevailing wage complaints filed against the Proposer within five (5) years prior to the bid submittal date that demonstrates a pattern of failing to pay workers prevailing wages, unless there are extenuating circumstances that are acceptable to the County. The Proposer shall submit a list of prevailing wage complaints filed against it within five (5) years of the bid submittal date along with a written explanation of each complaint, and how it was resolved. The County shall evaluate the explanations provided by the Proposer (and the resolution of each complaint) to determine whether the complaints demonstrate a pattern of the Proposer failing to pay EMSS workers

prevailing wages as required. The County may also evaluate complaints filed within the time period specified that were not reported by the Proposer. The County may also use independent sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.

- e. The Proposer shall not have had any public or other contracts terminated for cause by the government agency during the five (5) year period immediately preceding the bid submittal deadline for the project, unless there are extenuating circumstances acceptable to the County. The Proposer shall provide a duly executed sworn statement (in the included form, or in a form otherwise determine to be acceptable to the County that the Proposer has not had any public contract terminated for cause by a government agency during the five (5) year period immediately preceding the bid submittal deadline for the project. The County may also use independent sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
  - f. The Proposer shall not have a record of excessive claims filed against the retainage of payment bonds for public projects within three (3) years of the bid submittal date, that demonstrate a lack of effective management by the Proposer of making timely and appropriate payments to EMSS subcontractors, suppliers, and workers, unless there are extenuating circumstances which are acceptable to the County.
  - g. Within two (2) years prior to the bid submittal date the Proposer shall not have received any willful safety violations, and the Proposer shall not have received more than two (2) serious safety violations (i.e., WISHA/OSHA written citations) for the Washington State Department of Labor and Industries or analogous agency with jurisdiction in the location the work was performed, regardless of whether such willful and/or serious safety violations have been abated or not. The Proposer shall provide County with a list of any and all willful and/or serious safety violations (i.e., WISHA/OSHA written citations) from the Washington State Department of Labor and Industries or analogous agency with jurisdiction in the location the work as performed, regardless of whether such willful and/or serious safety violations have been abated or not. The County may verify such information provided with the Washington State Department of Labor and Industries or analogous agency with jurisdiction in the location the work was performed. The County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with these supplemental criteria.
- C. All Proposers must supply and provide the forgoing described Proposer responsibility information, documentation, and materials to the satisfaction of the County. If a Proposer fails to supply the required Proposer responsibility documentation, information, or materials, then Proposer may be determined by the County to be non-responsive, and the bid may be rejected on this basis. If the County determines the Proposer does not meet the Proposer responsibility criteria above and is therefore not a responsible Proposer, the County shall notify the Proposer in writing with the reasons for EMSS determination. If the Proposer disagrees with this determination it may appeal the determination within twenty-four (24) hours of receipt of the County's determination by presenting additional written information to the County. The County will consider the additional information before issuing EMSS final determination. If the County's final determination affirms that the Proposer is not responsible, the County will not execute a contract with any other Proposer until

two (2) business days after the Proposer determined to be not responsible has received the final determination. Please note that the above-described information, materials, and documentation requested by the County for purposes of determining Proposer responsibility is not necessarily exclusive, and the County expressly reserves the right to request additional information, materials, and documentation as may be determined to be necessary or desirable by the County in order to evaluate and determine Proposer's compliance with the above- described Proposer responsibility criteria. At all times, the County may also use other sources of information that may be available to otherwise determine whether the Proposer is in compliance with the forgoing Proposer responsibility criteria.