



WASHINGTON STATE AUDITOR'S OFFICE

WORK REQUEST FOR COMMUNICATIONS SERVICES K620-WR-1902

Professional Communications Services: Work Request

This Work Request is issued under your Convenience Contract #K605-C-1806 with the Washington State Auditor's Office.

Work Request Number:	K620-WR-1902	Date Issued:	2/8/2019
Service Category:	<input type="checkbox"/> Graphic Design	<input checked="" type="checkbox"/> Videography or Photography	
Number of business days to respond to this request:	6		
Responses are due by 2:00 pm local time on:	2/15/2019		
<p><i>Late submissions cannot be considered.</i></p> <p><i>Please only respond if you are preapproved under the appropriate service category. You must have a signed agreement with the State Auditor's Office to be a prequalified vendor.</i></p>			
Please have your response submitted via email to:	contractmanager@sao.wa.gov		
Questions regarding this solicitation are due by 2:00 pm local time on:	2/11/2019		
Expected Work Period of Performance			
From:	2/20/2019	To:	3/11/2019

I. REQUEST FOR SPECIFICATIONS

A. Title – Videography: A fresh way of envisioning old data: re-introducing the award-winning Financial Intelligence Tool

B. Overview

The Office of the Washington State Auditor (SAO) has struck a blow for the democratization of governmental financial data to Washingtonians through the redesigned Financial Intelligence Tool. Our Office collects the annual financial reports of all local governments in the state of Washington; we have now made this data accessible and simple to understand.

But FIT is more than a bunch of data—we designed this to be an educational experience, a place to inspire civic engagement and elevate the discourse on government operations. A previously difficult to understand and inaccessible world is now available to anyone who wants to explore it.

Governments have a responsibility to the public they serve to provide their information in an accessible manner; FIT is a groundbreaking and interesting way to fulfill that responsibility. To help state residents, government leaders and financial staff capitalize on this opportunity, SAO seeks to produce an engaging and informative video about FIT that is designed to get the public’s attention. The digital video medium allows SAO, with professional expertise provided through this contract, to reach potential FIT users across the state and set a tone of excitement and commitment to transparency for this project. This video will serve as the last in a series of innovative, funny and engaging videos SAO produced to introduce its new services to its clients as well as to the public. You can see the [first video here](#) and the [second video here](#).

Project Background

SAO originally developed the Financial Intelligence Tool, or FIT, to help local government officials monitor their financial situation.

FIT was developed in response to a 2013 advisory leadership group’s request that the Center make fiscal distress a priority. While financial condition is a required audit area to assess, not all governments are audited annually. Yet many governments relied on the audit as a key indicator of financial distress. The goal of FIT was to provide a way for officials to regularly monitor their financial situation without waiting for an audit.

To allow local governments a chance to correct any problems with their data, each local government was initially only allowed to view their own data in FIT to ensure its accuracy.

When FIT was initially released in 2014, local government staff and officials were told that they should use this tool to better understand their government’s financial health, identify and correct any problems with data and tell their governments’ financial story in a way that the public can understand. Local governments were also informed that someday this public information would be publicly displayed. FIT has won several national awards for its innovative approach to local government fiscal health. The Center is considered a national leader in data visualization of government fiscal health because of FIT.

Five years after its inception, the latest and most-advanced version of FIT will be launched in February 2019. All of its data will be available to the public for first time. Not only will the data be made public, but the data interface is designed to be easily understandable to non-financial experts, serve a role in civic education as well as create crucial conversations around the operations of Washington's local governments.

C. Project Scope and Objectives:

The scope of this contract is to create an engaging, informative and creative video or videos that engages the public about the potential of FIT. The successful vendor will work with SAO to learn about the functionality of FIT, develop a plan of how to communicate to the media and public about FIT through video medium, and deliver a video that meets that objective. The video will be debuted at SAO's All Agency Conference on March 11, 2019.

Proposers must be clear about what deliverables they will deliver directly and which ones they will subcontract.

Proposals should clearly identify each deliverable being bid, including estimated costs and staff hours. The SAO retains the right to select any proposer for any individual deliverable.

On page 6 we include a template for deliverable details. Proposers should use this template to enable us to understand which deliverable(s) they are bidding on and the hours and costs for each one.

D. Deliverables

Task 1:

Create a comprehensive plan for a promotional video/videos for the redesigned Financial Intelligence Tool based on research into the Tool's functionality, as well as marketing best practices for communicating financial data visualization tools to the public, all while keeping SAO/the Center for Government Innovation/FIT's existing brand identity in mind.

Task 2:

Script, shoot and edit the video(s), submitting the video(s) to SAO for editorial input and brand control at key points for review and approval.

Task 3:

Deliver the video in electronic as well as hard copy (through a removable hard drive) format to SAO by the deadline of March 11.

II. VENDOR'S RESPONSE**A. Work Request Coordinator**

The Work Request Coordinator is the sole point of contact at State Auditor's Office for this procurement. All communication between the proposer and State Auditor's Office will be with the Work Request Coordinator, as follows:

Missy Lipparelli

Washington State Auditor's Office

P.O. Box 40031

Olympia WA 98504-0031

Telephone Number: (360) 725-5574

E-mail Address: contractmanager@sao.wa.gov

Physical Address for Hand Delivery or Courier Service:

Washington State Auditor's Office

3200 Sunset Way SE

Olympia WA 98501

Any other communication will be considered unofficial and nonbinding on the State Auditor's Office. Proposers are to rely only on written statements issued by the Work Request Coordinator. Communication directed to parties other than the Work Request Coordinator may result in disqualification of the proposer.

B. Work Request Response – Instructions to Vendors

The State Auditor's Office reserves the option to award work from this solicitation to multiple contractors.

The budget for this project is not advertised.

Proposals and attachments must not exceed 20 pages. Proposals should include work plans, schedules and budget for both Tasks 1 and 2.

The following are not included in the 20-page limit: Customer References and Staff Resumes.

Proposals must, describe qualifications and experience of the firm, and proposed staff, to respond to the specific scope of work.

Proposals should include the number of hours and cost to complete each deliverable you are working on, the hourly rate proposed for you to complete the work, and a firm, fixed cost for completing the total work you are bidding. Here is a template to show you how we want to see the deliverable details, hours and costs:

Deliverables	Hours	Rate	Cost
Task 1:			
•			
Total Cost Task 1			<hr/>
Task 2:			
•			
Total Cost Task 2			<hr/>

Proposers should also describe:

(For Task 1): Their specific plan to transfer knowledge from the contractor(s) to department staff, and describe how the contractor(s) will verify that department staff have successfully acquired the knowledge.

(For Task 2): The process and services/deliverables/tasks/activities the contractor believes will quickly and cost-effectively produce the best tool design, given the criteria listed under Task 2 of the Project Scope of Work section.

Proposers must commit that the proposed staff will actually perform services. By submitting a proposal the bidder agrees not to remove the selected staff person without the prior approval of the SAO Project Manager. The bidder agrees that they will submit the name and résumé (with qualifications and relevant experience) of the proposed replacement. SAO Project Manager approval must be received before the individual may be assigned responsibility for services. Approval will not be unreasonably withheld.

The proposer must provide résumés for the named key staff, and subcontractor employees performing work for the proposer of this contract. Each résumé must include information on the individual’s specific skills related to this project, education, experience, significant accomplishments, and responsibilities assumed on other similar projects as well as any other pertinent information. Subcontractor résumés must display the word “SUBCONTRACTOR” in bold letters clearly printed across the top of the first page.

The proposer must include three relevant customer references and include contact information and brief project description for each.

Questions regarding this work request must be submitted in writing to the Work Request Coordinator no later than 2:00 p.m. local time on 2/11/2018.

Consultants may submit proposals via email. The proposal, whether emailed, mailed or hand-delivered, must arrive at the State Auditor’s Office no later than 2:00 p.m. local time, Olympia, Washington on 2/15/2018.

The proposal is to be sent to the Work Request Coordinator at the address noted above. The proposal should be clearly marked with the agency work request number **K620-WR-1902** and to the attention of the Work Request Coordinator.

Consultants mailing proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the Work Request Coordinator. Consultants assume the risk for the method of delivery chosen. The State Auditor's Office assumes no responsibility for delays caused by any delivery service. Proposals may not be transmitted using facsimile transmission.

Consultants should allow sufficient time to ensure timely receipt of the proposal by the Work Request Coordinator. All proposals and any accompanying documentation become the property of the State Auditor's Office and will not be returned.

III. EVALUATION AND SELECTION CRITERIA

A. Mandatory and Highly Desirable Experience and Qualifications

1. **Mandatory Experience and Qualifications:** The successful vendor must have a proven track record of creating highly successful videos designed to explain complex governmental, financial and/or data visualization tools to the media and public.
2. **Highly Desired Experience and Qualifications:** We welcome vendors who are creative and think outside the box when it comes to ways to engage our target audience and "break through" their defenses to get them to pay attention to the possibilities and potentials of the new FIT tool.

B. Weight Evaluation Criteria:

Responsive proposals will be evaluated based on the instructions and information contained in this work request. SAO will create an evaluation team(s) to determine the ranking of the proposals. SAO reserves the right to contact a contractor to clarify any portion of their proposal. At their discretion, SAO reserves the right to conduct oral interviews of the highest scoring proposers to determine the final contract award. The oral interview, if conducted, will determine the apparent successful vendor. While it is our desire to hire one consultant capable of providing all the services requested above, the SAO reserves the right to contract with more than one vendor to perform this work at their discretion.

<u>PRELIMINARY SCORE</u> <u>REQUIREMENTS/CRITERIA</u>	<u>WEIGHT</u> <u>ASSIGNED</u>
Approach/Methodology/Availability	40%
Qualifications and Experience of Staff	30%
Qualifications/Experience/References of the Firm	20%
Price Proposal	10%
Oral Presentation/Interview (if used)	Pass/Fail

IV. ADMINISTRATION

A. Debriefing of Unsuccessful Proposers

Proposers who submitted a proposal and were not selected will be given the opportunity for a debriefing conference. The Solicitation Coordinator must receive a written request from the unsuccessful proposer for a debriefing conference within three (3) business days after the Notification of Unsuccessful Proposer letter is e-mailed or faxed. The request for a debriefing can be in hard copy or via e-mail. The debriefing will be held within three (3) business days of the request unless the State Auditor's Office schedules otherwise.

Discussion will be limited to a critique of the requesting proposer's proposal. 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.

B. Protest Procedure and Format

This procedure is available to proposers who (1) submitted a response to this solicitation document and (2) have participated in a debriefing conference. Upon completing the debriefing conference, the proposer is allowed five (5) business days to file a protest of the procurement with the Solicitation Coordinator. Protests may be submitted by facsimile or e-mail, but must be followed by the original document.

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

All protests must be in writing and signed by the protesting party or an authorized agent. The protest must state 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. All protests will be addressed to the Solicitation Coordinator.

- Only protests stipulating an issue of fact concerning the following subjects will be considered:
- A matter of bias, discrimination or conflict of interest on the part of the evaluator.
- Errors in computing the score.
- Noncompliance with procedures described in the procurement document.

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) State Auditor's Office's assessment of its own and/or other agencies' needs or requirements.

Upon receipt of a protest, a protest review will be held by the State Auditor's Office. The State Auditor's Office will designate three individuals who were not involved in the procurement to consider the record and all available facts and issue a decision within five 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 proposer that submitted a proposal, such proposer will be given an opportunity to submit its views and any relevant information on the protest to the Solicitation Coordinator. The final determination of the protest will:

- Find the protest lacking in merit and uphold the State Auditor's Office's action; or
- Find only technical or harmless errors in the State Auditor's Office's acquisition process and determine the State Auditor's Office to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide State Auditor's Office 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 the State Auditor's Office determines that the protest is without merit, the State Auditor's Office will enter into a contract with the apparent successful contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

C. The Agency's Option To Extend

The agency reserves the right to extend the Work Order issued under this Work Request for two (2) additional years at the agency's option.

D. The Agency's Right to Cancel

The agency reserves the right to cancel this Work Request at any time, reject any and all responses received, and/or not to execute a Work Order from this Work Request without penalty to the agency. The release of this solicitation document does not obligate the agency to contract for the services specified in this Work Request. The agency shall not be liable for any costs incurred by a Vendor in preparation of a proposal submitted in response to this Work Request, in the conduct of an oral interview, or any other activity related to responding to this Work Request.