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Informal Solicitation No. 4984

Computer Software Training

Important Information:

- Solicitation Issued: Day / Date: **Tuesday / June 20, 2017**
- Deadline for Questions: Day / Date: **Monday / June 26, 2017** Time: **2:00 PM PT**
- Submittals/Proposals Due: Date: **Wednesday, July 5, 2017** Time: **4:00 PM PT**
- SHA's Contact: Name: **Greg Antoine**
- E-Mail Address: **Gregory.Antoine@seattlehousing.org**

The Seattle Housing Authority (SHA) for itself or as an agent for another SHA related entity (hereinafter "SHA"), is soliciting Submittals/Proposals from qualified individuals and businesses interested in performing the following:

Project Description:

The Seattle Housing Authority (SHA) is seeking partnership with an experienced and qualified software training company to provide technical skills software training to SHA staff. The selected firm will develop curriculum, presentation and learning materials, and facilitate hands-on training for SHA employees on Microsoft Office software. Other software training may be included in the contract as determined by business need.

Scope of Work:

The Scope of Work is as follows:

Contractor requirements: The selected consultant will partner with Human Resources to provide technical software skills training.

The Consultant will:

- Provide access to individual skills assessment inventories for staff interested in software technical training;
- Develop/provide standard learning curriculum and related materials (or customized) for Microsoft Office and related training requests including participant workbooks;
- Develop/provide online learning environments for staff to practice during training classes. All learning environments must be compatible with Citrix;
- Provide technical subject matter experts to facilitate onsite training classes. When possible, tailor training content and presentation styles to accommodate various learning levels.
- In partnership with Human Resources, evaluate the effectiveness of trainings and adjust as needed to meet the needs of the Agency and staff.

All training will be conducted at SHA facilities. Trainings may be offered in half-day (4 hour) or full-day (8-hour) software trainings. Dependent on the training topic, classes may be offered in two full-day sessions, if necessary.

SHA will:

- Provide a meeting space of adequate size for the group to be trained, individual computers, an LCD projector, speakers and screen, easel stands, blank easel pads.
- Appoint a SHA staff person to coordinate with the facilitator and be the point of contact.
- Provide IT technical support for the online learning environment.

Cancellation policy for training classes: Either party can cancel a class or course with 1 week written notice, either by email or fax. In the case of illness or emergency conditions, either party can re-schedule a class by mutual agreement.

Schedule: It is anticipated that the work will be performed between July 2017 and July 2018.

Anticipated Contract Duration: SHA expects to execute a Contract for the requested services for the scheduled dates shown above. If necessary, and at SHA's option, four (4) one year term extensions and appropriate scope and compensation adjustments may be made by Change Orders to the Contract.

Estimated Amount: The estimated annual spend on this contract will be \$25,000.00

Contents Required in Your Submittal/Proposal: Your Submittal/Proposal must include:

- A cover letter that includes:
 - a) An expression of your interest in performing the work
 - b) The name, telephone number and e-mail address of who your contact person is for this solicitation
 - c) Signed by a principal or officer of the firm authorized to execute contracts or other similar documents on the firm's behalf
- A list of three references that includes:
 - a) Agency or business name of client
 - b) Contact person at that agency or business
 - c) Address of agency or business
 - d) Telephone number and/or e-mail address for the Contact person
- Your response to each of the Evaluation Criteria noted below:
 - a) General Training Experience: Describe your experience successfully working with staff of public agency or non-profit services agencies including working closely with Human Resources Department to conduct technical software skills training, including designing appropriate course content for target audience, conducting training sessions, offering follow-up sessions when appropriate, conducting course surveys and relaying summary results for future refinements, and related elements;
 - b) Diversity and Race and Social Justice Experience: Describe your experience with tailoring and delivering training in an equitable way for diverse audiences. For example, providing training to people from different racial backgrounds, education levels, language backgrounds, work roles.

- c) Proposed Cost: Price / Rates proposal for classes and consulting is required for each proposal and prices/rates must be provided for a proposal to be determined responsive. When proposing a price for each course, the Trainer/Facilitator shall consider and, at a minimum, include the following:
- 1) Each course may be divided into a flexible number of sessions, to be scheduled over a mutually workable time period, designed for most productive learning.
 - 2) Session dates are to be scheduled as mutually agreed upon, three weeks or more in advance of the training
 - 3) Optimal learning, classroom size. Experience shows that class sizes at SHA usually average 12 persons.

Your submittal/proposal shall not exceed four (4) pages. Your cover letter and any forms required to be included with your submittal/proposal do not count toward the maximum number of pages.

Attachments to be Included with Your Submittal/Proposal: The following forms are sent via separate links to this solicitation: You must complete and attach the forms listed below with your submittal/proposal:

- Vendor Fact Sheet
- Section 3 Business Certification and Resident Employment Plan
- Suspension and Debarment Compliance Certificate for Consultant and Sub-Consultants
- Certifications and Assurances Form
- Certifications and Representations of Offerors – Non-Construction Contract (form HUD-5369-C)

Evaluation Criteria: SHA will evaluate submittals/proposals received based on the following weighted subjective/technical criteria. Your submittal/proposal should directly address each of the Criteria listed below:

No.	Evaluation Criteria	Maximum Number of Points
1	General Training Experience	50
2	Diversity and Race and Social Justice Experience	20
3	Proposed Cost	30
MAXIMUM TOTAL POINTS		100

SHA reserves the right to check references of one or more of the top ranked firms. In conducting reference checks, SHA may include itself as a reference if the Proposer has performed work for SHA, even if the Proposer did not identify SHA as a reference.

In the event that information obtained from the reference checks reveals concerns about the proposer's past performance and their ability to successfully perform the contract to be executed based on this solicitation, SHA may, at its sole discretion, determine that the proposer is not a responsible proposer and may select the next highest-ranked proposer whose reference checks validate the ability of the proposer to successfully perform the contract to be executed based on this solicitation.

Due Date for Questions: Any questions or requests for further information must be directed in writing no later than the date mentioned at the beginning of this solicitation. Questions are to be sent by e-mail to SHA's Contact, also shown at the beginning of this solicitation.

Submittals: Submittal/Proposal due date is shown at the beginning of this solicitation. You are required to submit as indicated below. Use the submittal process that is checked.

By e-mail to SHA's Contact shown at the beginning of this solicitation.

Administrative Information:

A. About the Seattle Housing Authority (SHA): Visit SHA's website at www.seattlehousing.org for more information about SHA.

B. Deadline for Submission of Submittals/Proposals: Proposers are responsible for ensuring that SHA receives your submittal/proposal as indicated herein by the stated deadline. Submittals/Proposals received after the deadline will not be considered.

C. Contract Requirements: Proposers may review a sample of SHA's standard contract language that will form the basis for any contract executed based on this solicitation by visiting the following website:

http://www.seattlehousing.org/business/guidelines/pdf/Consultant_Professional_Services_Contract.pdf

SHA's standard contract document is intended to guide you in developing your submittal/ proposal. The actual contract that the successful Proposer and SHA will sign will be based on this sample contract. Please be advised that SHA will only negotiate some aspects of the contract. Much of the contents of the sample contract are based on non-flexible requirements and cannot be modified in any form.

D. Certifications and Assurances Form: In the event that the Contract for these services includes any HOPE VI Revitalization grant funds or any Choice Neighborhood Implementation (CNI) grant funds, the Consultant shall obtain and submit to SHA a completed and signed Certifications and Assurances Form (copy attached to this solicitation if applicable) for itself and each sub-consultant utilized on the Contract. Such form shall be submitted to SHA before any work is performed under the terms of the Contract.

E. Payment Requirements: Proposers should be aware that SHA will only make payments on the Contract issued under this solicitation after the work being billed has been completed, and will pay reimbursable expenses only upon receipt of an invoice for the reimbursable expenses. No advanced payments will be made to the proposer, who must have the capacity to meet all project expenses in advance of payments by SHA.

F. Insurance Requirements: The individual or business selected by SHA will be required to provide acceptable evidence of insurance prior to beginning work. The following summarizes the required insurance coverage. Additional requirements are detailed in the contract that SHA will execute with the selected individual or business. See Section 10 of the standard consultant contract for a complete listing of SHA's standard insurance provisions.

The following insurance coverage(s) / requirements will be required for this project:

- An ACORD Certificate of Insurance.
- Commercial General Liability: \$1,000,000 each occurrence, \$2,000,000 aggregate
- Additional Insured Endorsement Ongoing Operations naming the Seattle Housing Authority as an additional insured on a primary and non-contributory basis on the Commercial General Liability policy, ISO form CG2010 or equivalent. Blanket additional insured endorsements may be acceptable, but must be approved by SHA's Risk Manager.
- Additional Insured Endorsement Completed Operations ISO Form CG2037 or equivalent. Blanket additional insured endorsements may be acceptable, but must be approved by SHA's Risk Manager
- Washington Stop Gap or Employers Liability: \$1,000,000 each occurrence
- Workers Compensation: A policy of Workers Compensation. As respects Workers Compensation insurance in the State of Washington, the Consultant shall secure its liability for industrial injury to its employees in accordance with the provisions of Title 51 of the Revised Code of Washington (RCW). If the Consultant is qualified as a self-insurer in accordance with Chapter 51.14 RCW, the Consultant shall so certify by a letter signed by a corporate officer, indicating that it is a qualified self-insured, and setting forth the limits of any policy of excess insurance covering its employees, or any similar coverage required.
- Automobile Liability: \$1,000,000 combined single limit
- Cyber Liability including coverage for Business Interruption, Network Security, and Electronic Communication: including both first and third party coverage, covering claims involving privacy violations, information theft, damage to or destruction of electronic information, intentional and/or unintentional release of private information, alteration of electronic information, extortion and network security with minimum limits of \$1,000,000 on each occurrence. This coverage can be either stand alone or included within Professional liability policy.
\$1,000,000 per claim / aggregate
- Evidence that sexual misconduct has not been excluded from the commercial general liability policy

G. Criminal Background Investigation: The selected Consultant shall conduct a criminal background investigation of all employees, volunteers, subcontractors and sub-consultants performing any work who may reasonably be expected to have direct or incidental contact with SHA residents, SHA staff members, or vulnerable population. In addition, a criminal background investigation shall be performed for any person performing work under this Contract who is given use of an SHA building-access card or who collects payments of any kind. The criminal background investigation shall include, but not necessarily be limited to, a Washington State Patrol background report or if the employee, volunteer, subcontractor or subconsultant resides in a state other than Washington, the background report should be obtained from the state patrol office where the employee, subcontractor or subconsultant has resided for the last 3 years. In the event a background check provides evidence of a felony conviction that information shall be provided to the SHA Project Manager. If any person performing work under this Contract is charged with a felony, the Consultant agrees to remove that person from

performing any further work on the project unless and until SHA agrees in writing to allow the person to continue.

- H. Diversity: SHA strongly encourages small businesses, minority business enterprises (MBEs), women business enterprises (WBEs), HUD Section 3 businesses, socially and economically disadvantaged businesses and veteran-owned businesses to submit proposals or to participate in this work as sub-consultants.
- I. Rights Reserved by SHA: SHA reserves the right to waive as an informality any irregularities in submittals/proposals, to reject any or all submittals/proposals, and to cancel this solicitation at any time prior to contract award. SHA also reserves the right to award all or any portion of the work specified in this Informal Solicitation to any proposer(s). Prior to making a selection decision, SHA reserves the right to interview any or all individuals or businesses submitting for this work, and to check references as part of the final evaluation process. Any protest of the selection process shall be resolved in accordance with SHA's Procurement Policies, which may be reviewed at the following website address:

http://www.seattlehousing.org/business/guidelines/pdf/Procurement_Policies.pdf