

Eric Mudgett-

Did Steve Brown work for you?

Has worked with Steve Brown since 1999- on drug task force.

Would you rehire Steve Brown?

I would hire him again.

Anything you would like to contribute?

A no nonsense kind of guy. You know where you stand with Steve

Frank Rogers-

Did Steve Brown work for you?

Has worked with him a long time.

Would you rehire Steve Brown?

Yes, I would hire him again, hands down. He wished that Steve Brown was elected in his spot.

Anything you would like to contribute?

We would be very lucky to have Steve work for the City. He has all the knowledge and takes pride in his job. Love the man.

City of Tonasket

From: City of Tonasket <tonasket@nvinet.com>
Sent: Tuesday, March 26, 2019 5:11 PM
To: 'City of Tonasket'
Subject: FW: council packet

From: Jensen Sackman [mailto:jensensackman14@gmail.com]
Sent: Friday, March 08, 2019 5:04 PM
To: City of Tonasket <tonasket@nvinet.com>
Cc: jmritter1967@gmail.com; Christa Levine <teaganfortonasket@gmail.com>; Maria Moreno <mariamoreno.cityoftonasket@gmail.com>
Subject: Re: council packet

Questions for possible applicants for the Internal Compliance Administrator

Questions for Perry & Brown (Criteria)

Yes	No
YES	

Ability to work independently?

Question for **Perry** – In your proposal you state, “with the assistance of a qualified and trusted sub-contractor”. Is this sub-contractor included in your quote of \$24,660 and will they meet City requirements?

Question for **Brown** – Will you be using or anticipate needing an additional subcontractor and is that included in your proposal? If needed will they meet City requirements?

No, I will not need any additional sub-contractors

Questions for References (Candidates do not answer)

Did he work for you?

Would you rehire him?

Anything else you would like to contribute?

Answers will be provided to Council and the Mayor and subject to public disclosure.

This was forgotten on my part.

Sent from my iPhone

On Mar 8, 2019, at 4:33 PM, City of Tonasket <tonasket@nvinet.com> wrote:

Part 1 of 2

Alice J. Attwood
Clerk-Treasurer
City of Tonasket
P.O. Box 487
Tonasket, WA. 98855
P. 509-486-2132
F. 509-486-1831

<Council packet 3-12-2019 #1.pdf>

SEP CONSULTING

Public Safety Consulting Services
Steven E. Perry – President

February 25, 2019

Ms. Alice Attwood
City of Tonasket
209 South Whitcomb Ave
Tonasket, WA. 98855

Ms. Attwood;

SEP Consulting is pleased to submit this response to the city's Request for Proposal for Internal Compliance Administrator. We trust that after reviewing this response, you will agree that my business is uniquely qualified to provide the services the City of Tonasket seeks.

These unique qualifications are namely, (1) familiarity with the former Police Departments records and evidence, (2) knowledge and extensive experience in both areas of public safety, and (3) a proud history of assisting agencies with their records and evidence needs around the state.

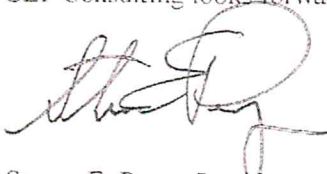
Familiarity refers to the fact that in 2018, SEP Consulting conducted a complete review of the department's evidence function. This included a "hands on" review/research of every piece of evidence in police custody at the time, along with an analysis of the entire evidence and records function. That process resulted in the return, disposal, or other disposition of approximately two thirds of the departments existing evidence. Upon the completion of that project, I was asked to return in 2019 to continue this evidence work, and additionally undertake a similar process for the agency's investigative records. Obviously now due to changing circumstances, this didn't occur. Essentially, many aspects of this RFP are a continuation and finalization of what we started last year and agreed to continue this year.

The "knowledge and experience factor" addresses my 45 years of related public safety experience, and probably most notably my knowledge of current applicable laws relating to police records and evidence. I also have 37 years of teaching related topics for several community colleges, private companies, professional organizations and most notably the Washington State Criminal Justice Training Commission.

Lastly, the "proud history" denotes my 25+ year history of personally working with law enforcement agencies around the state regarding law enforcement evidence, property, and records with an emphasis on evidence room management and customized assessments.

While this response attempts to address all of Tonasket's listed goals, if selected, additional discussion will be needed to assure we are all in concurrence. Be assured all tasks will be accomplished professionally, appropriately and legally.

SEP Consulting looks forward to working with the City of Tonasket on this project.



Steven E. Perry, President
SEPConsulting@Comcast.net

SEP CONSULTING

Public Safety Consulting Services
Steven E. Perry – President

City of Tonasket – Response To SCOPE Of Work & General Issues

While the published scope of work is detailed in many areas, there are areas that will require clarification or refinement through discussion with the city. Additionally, while some of the posted tasks are general and seemingly simple in nature, they are not. To assure the city of a legal and professional process SEP Consulting will establish defined steps, made readily available to the city.

SEP Consulting shall accomplish all tasks listed in the scope of work based on experience and knowledge, utilizing all appropriate options to comply with the city's goal to "close down" their former department.

At this time, while there may be questions as to how the city wishes pieces of the project to proceed, I see nothing on the Scope of Work that SEP Consulting will not be able to complete. Barring any major unforeseen circumstances arising, it is anticipated this project can be completed within 90 days of commencement.

From day one of the project, through completion SEP Consulting will maintain a one million (\$1,000,000.00) dollar Professional Liability Insurance Plan, and a two million (2,000,000.00) dollar General liability Insurance Plan.

One person can obviously not appropriately complete this project in the required time frame therefore assistance will be required. SEP Consulting will sub-contract for assistance for some tasks, using only known, trusted and qualified criminal justice professionals. If/when additional manual labor or clerical assistance is required, SEP Consulting will only utilize known and trusted individuals who will be accompanied and/or supervised.

Coordination

This project requires coordination and/or assistance from various outside entities. This is due to active investigations, ongoing statute of limitation concerns, required compliance with various laws, and requirements of the State Patrol, State Archivist, State Auditor and Department of Ecology. Therefore, coordination is required with the following agencies.

- Okanogan County Prosecutors Office
- Okanogan County District, Juvenile and Superior Courts
- Washington Association of Sheriffs and Police Chiefs
- Washington State Secretary of State, Division of Archives
- W S P. Crime Lab and W S.P. Toxicology Lab
- Okanogan County Sheriff's Office
- Tonasket City Attorney's Office
- While unlikely, possibly the Department of Ecology and/or the Attorney General's Office.

SEP Consulting realizes how important this project is to the City of Tonasket, and equally desires a successful outcome. It will therefore be critical that ongoing discussion and cooperation between SEP Consulting and the city occur throughout the project.

Assurances From SEP Consulting

- All handling of physical evidence will be performed by Steven Perry, with the assistance of a qualified and trusted sub-contractor.
- Every piece of evidence removed from the city's possession will be individually documented and witnessed by a sub-contractor.
- All screening of evidence will include an individual 8-9 step process
- All screening of investigation reports for purging will undergo an individual 7 step process.
- All purged documents will be documented pursuant to RCW and State Archive guidelines.
- All documents requiring transfer to either the state archives or WASPC will be documented.
- All general inventory items will be photographed and documented for city disposition.
- All firearms will be handled safely and released/disposed of per state & federal law

Assumptions/Conditions Upon Awarding of Project

Once the process begins the following assumptions/conditions are required by SEP Consulting to successfully undertake the process with professionalism and process integrity. Specifically SEP Consulting must have

- sole access to all physical evidence and records.
- sole access to any city owned equipment while being inventoried.
- full access to the Spillman system by qualified SEP Consulting sub contractors.
- Full access to DOL/WASIC/WASIS/NCIC/NIC's systems through the Sheriff's Office & Dispatch.
- unfettered access to both of the existing buildings that hold related items.
- approval to contact the city attorney on records issues related to ongoing or potential litigation.
- authorization to make routine decisions regarding the disposition of evidence and records in accordance with state law and accepted general practices.
- an authorized contact person to provide any needed approvals or decisions.

Additionally, SEP Consulting will

- fully and transparently cooperate with the city.
- coordinate/respond to all existing public records requests regarding police records only.
- coordinate/respond to any future public records requests regarding police records received prior to the completion of this project.
- complete each task based on experience and knowledge of the options allowed under law
- coordinate with the city as to any remaining records or evidence upon project completion

SEP CONSULTING METHODOLOGY

- Detail Oriented with Hands On Approach!
- Attention to RCW/WAC/ DOE Compliance!
- Custom Service To Meet Client's Needs!
- Continued Support After The Job is Done!

SEP CONSULTING

Public Safety Consulting Services

Steven E. Perry – President

This background information relates to necessary skills to perform the duties of "Internal Compliance Administrator" for the City of Tonasket. Additional experience history and other information provided upon request.

EXPERIENCE

1974 - 1997

ADMINISTRATIVE SUPERVISOR, EDMONDS POLICE DEPARTMENT

Performed/Supervised all records and evidence functions, including public records requests. Served as project manager on numerous complicated projects both agency & city wide. Eventually promoted to manage regional 911 and paramedic services.

1998 - 2009

EXECUTIVE DIRECTOR, SOUTHWEST SNOHOMISH COUNTY COMMUNICATIONS

Director of regional 911 center and paramedic services. Supervised 40+ employees. Project Manager (or representative for 12 public safety agencies) on both local and regional extensive projects. Direct oversight of all public records requests. Retired after 35 year career.

2009 - PRESENT

PRESIDENT, SEP CONSULTING

Public Safety consulting firm, specializing in law enforcement records and evidence issues. Provide various consulting services for agencies, including detailed assessments of their property and evidence programs. Facilitate / Instruct classes for Criminal Justice Training Commission. Advise on evidence & records issues to many law enforcement agencies throughout the state.

1987 - PRESENT

INSTRUCTOR, WASHINGTON STATE CRIMINAL JUSTICE TRAINING COMMISSION

Master Instructor / Facilitator for Law Enforcement Property & Evidence Management course and Law Enforcement Records Academy. Primary instructor for all property/evidence classes and co-instructor for records classes (emphasis on public disclosure and firearms issues).

2018 (July – October)

CONSULTANT, TONASKET POLICE DEPARTMENT

Undertook extensive research and review process, including an inventory of all physical evidence held by department. After consultation with Prosecutor (and assistance from police clerk), purged over 480 articles of evidence, assuring integrity of remaining evidence as of 10/31/2018. Generally reviewed existing police records, recommending organizational changes

SEP CONSULTING, LLC



Limited Liability Company

BUSINESS LICENSE

Unified Business ID #: 602905158

Business ID #: 001

Location: 0001

SEP CONSULTING, LLC
20911 22ND AVE W
LYNNWOOD, WA 98036-7904
TAX REGISTRATION - ACTIVE

This document is a public record under the Public Access Law. It is available for public review and copying. For more information, please visit the Washington State Department of Revenue website at www.dor.wa.gov. This document is subject to the provisions of the Information Access Act. All information contained herein is the property of the State of Washington and is provided for your information only. It is not to be used for any other purpose without the express written consent of the State of Washington. All information is provided as is and is not to be used for any other purpose without the express written consent of the State of Washington. All information is provided as is and is not to be used for any other purpose without the express written consent of the State of Washington.

Vicki Smith, Director of Revenue

STATE OF WASHINGTON

UBI: 602905158 001 0001

SEP CONSULTING, LLC
20911 22ND AVE W
LYNNWOOD, WA 98036-7904

TAX REGISTRATION - ACTIVE

Vicki Smith, Director of Revenue

SEP CONSULTING

P.O. Box 2007
Lynnwood, WA 98036
425-478-6826
SEPConsulting@comcast.net

REFERENCES

Bob Graham
State Coordinator For Law Enforcement Support
Washington Criminal Justice Training Commission
19010 1st Ave South
Burien, WA 98148
(206) 835-7302 | Bgraham@cjtc.state.wa.us

Relationship
Client - Mr. Graham or his predecessors have contracted with SEPConsulting since 2009 for training related services.

Mary Madole
City Clerk
City of Carnation
4621 Tolt Ave
Carnation, WA. 98014
(425) 549-0403 | Mary.Madole@carnationwa.gov

Relationship
Client - In 2016 examined (and where appropriate either destroyed or transferred) all police records and evidence after the city closed the police department to contract with King County for law enforcement services.

Amanda Hamilton
Records and Evidence Supervisor
Jefferson County Sheriffs Office
81 Elkins Road
Port Hadlock WA. 98339
(360) 385-3831 | Ahamilton@co.jefferson.wa.us

Relationship
Client - At the request of Ms. Hamilton, in 2018 conducted a detailed evidence assessment of Jefferson County's evidence function.

Donald Anderson
Assistant Police Chief
Edmonds Police Department
250 - 5th Ave Nor
Edmonds, WA. 98020
(425) 771-0200 | Don.Anderson@edmondswa.gov

Relationship
Client - Have performed three separate assessments for the department at Assistant Chief Anderson's request (2013, 2016, 2018).

References relevant to City of Tonasket project.

Numerous additional professional/personal references available upon request.

SEP CONSULTING

Public Safety Consulting Services

Steven E. Perry – President

City of Tonasket – Project Cost Quotation

Based on SEP Consulting's understanding of the posted "Scope of Work", the majority of listed items adequately provide sufficient detail to allow a quotation of anticipated costs.

If selected, SEP Consulting determines that the cost to undertake and complete this project, would not exceed \$24,660.00.

This quote includes all duties performed by SEP Consulting, including any subcontractors as described in the enclosed "response to scope of work and conditions" document. This quote also includes all standard mileage for contractors, any anticipated equipment rental or dump fees, supplies or any other miscellaneous project costs.

Additional Costs

This quote does not include any postage or publication fees required for legal notifications, nor any shipping costs associated with the return of evidence outside the City of Tonasket.


The posted Scope of Work states that the project includes " *additional work that is not listed in the above scope of work that will be required to complete the closure of the Police Department in a safe, efficient and professional manner*".

It is understood that not all required tasks on a project such as this can be listed in a one-page scope of work document, and it is not our goal to upcharge for any insignificant additions. Obviously though, no actual cost for added services can be provided at this time since this "added work" is unknown.

SEP Consulting will agree that any additional routine duties which are minor in nature (do not significantly increase workload or impact the timely completion of the project) will be included in the above cost quotation.

To be fair to all parties, SEP Consulting asks that any additionally required duties which significantly add to the project be separately negotiated with the city at that time, and mutually agreed upon prior to their undertaking. In lieu, upon request SEP Consulting can provide a set hourly fee for this added work, but typically finds this is costlier to the city.

UNITED STATES OF AMERICA

The State of  Washington

Secretary of State

I, **SAM REED**, Secretary of State of the State of Washington and custodian of its seal, hereby issue this

CERTIFICATE OF FORMATION

to

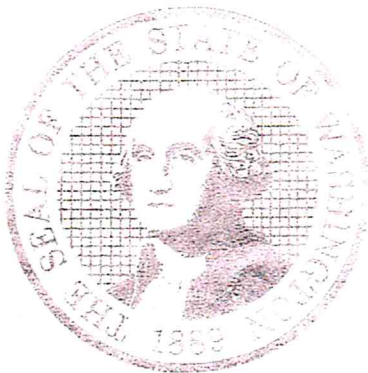
SEP CONSULTING, LLC

a/an WA Limited Liability Company. Charter documents are effective on the date indicated below.

Date: 3/6/2009

UBI Number: 602-905-158

APPID: 1385726



Given under my hand and the Seal of the State of Washington at Olympia, the State Capital

A handwritten signature in cursive script that reads "Sam Reed".

Sam Reed, Secretary of State

After reviewing there proposals only one difference stood out, so we asked for clarification. Attached is the additional question we asked, the response and also what references said.

Questions for possible applicants for the Internal Compliance Administrator

Questions for Perry & Brown (Criteria)

Ability to work independently?

SEE ATTACHED FOR SEP

Yes	No

Question for SEP– In your proposal you state, “with the assistance of a qualified and trusted sub-contractor”. Is this sub-contractor included in your quote of \$24,660 and will they meet City requirements? See Attached response from SEP

Question for SDB – Will you be using or anticipate needing an additional subcontractor and is that included in your proposal? If needed will they meet City requirements?

Questions for References (Candidates do not answer)

Did he work for you? SEE ATTACHED FOR SEP

Would you rehire him? SEE ATTACHED FOR SEP

Anything else you would like to contribute? SEE ATTACHED FOR SEP

Answers will be provided to Council and the Mayor and subject to public disclosure.

References Check for SEP

#1 Bob Graham
State Coordinator for law enforcement support
Washington Criminal Justice Training Commission
206-835-7302

I called and left a message regarding our three questions, his reply.

SEP Consulting has helped in years past with training and continues in annual training of newly elected Sheriffs and under Sheriff's. Bob Graham is extremely pleased with SEP continued training of hopes he will continue.

#2 Mary Madole
City Clerk
City of Carnation
425-549-0403

I called and asked our three questions, she said she was looking forward to the phone call and knew it was coming. She was very happy with SEP services and SEP helped close out a disbanded police department that had been closed down for close to 20 years. She couldn't rave enough about how happy she was about the work he did. He got it all down to 2 boxes.

#3 Amanda Hamilton
Records and evidence Supervisor
Jefferson County Sheriff's Office
360-385-3831

I called and asked our three questions. She was very happy with the work that SEP did in 2018 and felt that it was very efficient.

#4 Donald Anderson
Assistant Police Chief
Edmonds Police Department
425-771-0200

I called and left a message asking our three questions and never received a call back..

SEP CONSULTING

Public Safety Consulting Services
Steven E. Perry – President

City of Tonasket – Response To 3/1/2019 Questions

Please consider the following response to the two questions you provided via Email.

Ability to Work Independently? I am essentially a one-person business, so by definition independence is required. When consulting law enforcement agencies, I alone conduct the assessment, analyze the findings and write all client reports. When teaching, all preparation, logistics, scheduling, instruction, and follow-up is solely my responsibility.

In your proposal you state, “with the assistance of a qualified and trusted sub-contractor”. Is this sub-contractor included in your quote of \$24,660 and will they meet City requirements? The short answer is “yes to both”.

To clarify why I referenced sub-contractors for this project, typically there are police employees present to provide background information & data base assistance. Since this is not the case here, along with several unique RPF requirements, I believe some outside assistance is appropriate. I used the term “sub-contractors” due to the structure of my company (not having employees), as any paid assistance must be categorized as “sub-contracting”. Based on specific need, a subcontractor might spend many hours on the job site assisting me or elsewhere researching a specific issue. Anyone utilized for sensitive matters is personally known to me and has previously undergone backgrounding for their positions. SEPConsulting is very fortunate to have topic experts as resources throughout the state.

When dealing with evidence, it is essential there be a witness to the handling/disposition of items. This not only protects the city, but also the integrity of any potential criminal prosecution. Also, the city is subject to state sanctions if evidence is not dealt with properly. A second person assisting in the handling of Tonasket evidence is critical.

It is impossible to research years of criminal reports and hundreds of pieces of evidence without full access to an agencies records management system (Spillman). While I could be trained/authorized to use that system, doing so would significantly slow any progress. Using an already trained and competent Spillman user would be extremely valuable. I have access to such qualified people.

Since the RFP uniquely specifies “process public records requests”, it is presumed this means more than just forwarding files to the city attorney. The timely and accurate processing of PRR's can be complex, yet essential to avoid very costly penalties to the city. While I am experienced with law enforcement public records, the potential exists I may need to seek outside advice. Fortunately, I have access to some of the best topic experts in the state. Obviously, responses involving potential litigation or of other controversy would be still sent to the city attorney for final review.

If the city wishes the inventory of city owned property to include the moving/consolidation of furniture to one location, casual labor would be utilized, and supervised during this work.

The RFP includes “additional work not listed” which may require seeking assistance once those duties are defined. There also may be issues in closing the department that the city has not considered. As an example, will the Washington Association of Sheriffs and Police Chief's require completing of the backlog of required (yet uncompleted) monthly crime (IBR) reports? If so, I have qualified assets to accomplish this.

Lastly, the vice-president of SEPConsulting, my wife Emily, would assist with non-sensitive/clerical duties.

Thank you for considering these issues when making your decision.



Personal Services Contracts

This page provides a general overview of procedures local governments in Washington State should follow when contracting for personal services. It is part of MRSC's series on [Purchasing and Contracting](#).

For more detailed information, download MRSC's [Contracting for Services](#) publication.

What are Personal Services?

Personal services involve technical expertise provided by a consultant to accomplish a specific study, project, task, or other work. These activities and products are mostly intellectual in nature, and they do not include [architecture and engineering services](#), which have their own requirements.

Examples of personal services include, but are not limited to:

- Comprehensive plans
- Legal services
- Management analyses

Certain personal services may require licensing or certification by state agencies, such as accounting, legal, or medical services.

Personal services should not be confused with [purchased services](#), which are generally routine, repetitive, or mechanical in nature and support an agency's day-to-day operations.

Statutory Requirements for Personal Services

Only port districts and public facilities districts have statutory requirements for personal services contracts. No other local governments in Washington have statutory requirements.

Personal Services for Port Districts

[Chapter 53.19 RCW](#) establishes competitive requirements for port district personal services contracts. For details, download MRSC's [Personal Services Contracting Manual for Washington Ports](#).

Personal Services for Public Facilities Districts

The personal services requirements for public facilities districts (PFDs) are vague and depend on whether the PFD was created by a city or a county.

RCW 35.57.070 governs PFDs created by cities and requires the PFDs to “publish notice, establish criteria, receive and evaluate proposals, and negotiate with respondents.” The exact details must be established by district resolution, and competitive bidding is not required.

The same criteria apply for PFDs created by counties, except that RCW 36.100.180 requires competitive bidding for contracts over \$150,000. The exact competitive process is not specified.

PFDs may use the general guidance on this page, subject to their statutory requirements.

Personal Services Guidelines

Local governments are encouraged to follow the guidelines on this page. However, agencies must also consider their own resolutions, policies, and procedures to determine their own local contracting requirements.

Soliciting Proposals

Local governments generally have significant flexibility in determining how to solicit competition. However, if the project includes grant funding, the grant conditions may require a specific solicitation process. Generally, the more complex or expensive the project is anticipated to be, the more rigorous the solicitation process should be.

Suggested Bid Limits and Processes

MRSC suggests that small- and medium-sized agencies use the following dollar limits and processes for personal services. However, the exact limits and processes should be tailored to each particular agency. Agencies should always document these processes for the public record, including the selection criteria, the names of firms considered, all responses received, the basis for the award decision, and a copy of the final contract.

Minimal Competition

- Suggested dollar limit of \$5,000. Some level of competition is recommended, but not required.
- Place calls to 1-3 qualified firms or individuals describing the desired services. Request prices, schedules, and qualifications.
- Negotiate a contract with the lowest responsible bidder.

Informal Competition

- Suggested dollar limit of \$20,000.
- Prepare a written solicitation document including, at a minimum: a description of the required services, the project schedule, a request for the consultant's qualifications and costs/fees, and due date for the responses.
- Send the solicitation to 3-5 firms selected from the appropriate consultant roster or other list and ask for proposals.
- Evaluate the proposals and negotiate a contract with the lowest responsible bidder.

Formal Competitive Bidding

- Suggested for all contracts over \$20,000.

- Prepare a formal solicitation document such as a Request for Proposals or a Request for Qualifications. Describe all the project requirements in order for proposers to understand what the agency needs and how the responses will be evaluated.
- Publish legal notice in major daily newspapers to notify firms of the upcoming solicitation. Develop a mailing list of all firms responding to the solicitation.
- Post the solicitation document on the agency website (optional).
- Develop score sheets to be used by evaluators.
- Send the solicitation document to at least six firms, or notify at least six firms that the document is available at the agency website. If less than six firms are contacted, document the reasons.
- Conduct a pre-proposal conference, if required, and provide answers to bidders' questions via addenda.
- Require sealed bids and a public bid opening. Date- and time-stamp all proposals received.
- Evaluate proposals according to the score sheets, using at least three evaluators. Interview the top finalists, if desired.
- Negotiate a contract with the lowest responsible bidder.

Requests for Qualifications

Requests for Qualifications (RFQs) ask only for a firm's general capabilities, including:

- List of principals
- Previous projects
- Number of employees
- Licenses

Local governments may distribute RFQs for a services roster or as part of a formal competitive solicitation. In the case of a formal competitive solicitation, the RFQ can be combined with a Request for Proposals, or it could be distributed as the first step in the review process prior to distributing RFPs.

Requests for Proposals

Requests for Proposals (RFPs) ask proposes to submit qualifications, if not already on file, and a proposed scope of services in response to the agency's specific needs. At a minimum, every RFP should include:

- **Statement of need (scope).** This should be well-written with an adequate level of detail describing the project tasks and products, and listing the availability of supporting documents.
- **Estimated project budget.** State the estimated budget, but note that the amount is only an estimate.
- **Estimated schedule.** This should be realistic and closely tied to the scope.
- **Evaluation criteria.** Be clear and tie the criteria to the scope. Provide the scoring criteria, and provide the decision schedule if available.

- J Ward Packet Page 90 of 103
- **Proposal elements.** List all the information that interested firms should submit, including the firm's general approach to the project, a list of key personnel who would work on the project with their experience and availability, and general scope and deliverables. Keep the submittal requirements, page limitations, and due date in the same section of the RFP. Allow for flexibility in the format of responses.
 - **Submittal deadline.** Allow an adequate response time of 3-4 weeks. Accept electronic proposals, and acknowledge receipt of all proposals.
 - **Agency's standard terms and conditions.** Attach a copy of the terms and conditions, if available, to the RFP.

Other common RFP elements include:

- Background on the agency and project, including budgets
- Reference documents, although large documents may be posted to a website and referenced in the document
- Whether interviews will be included as part of the selection process
- The pre-proposal conference schedule
- Public disclosure guidance
- Notice that costs incurred in the development of proposals and the selection process will be assumed by the proposers
- Formal certification by the proposer of its authorization to submit the proposal, time validity of the proposal, non-collusion, etc.

Evaluation Criteria

Agencies may establish their own criteria for evaluating proposals. Potential evaluation criteria include, but are not limited to:

- Fees or costs
- Quality of previous performance
- Ability to meet contract deadlines
- Responsiveness to solicitation requirements
- Compliance with statutes and rules relating to contracts or services
- References
- Staff readily available for the project
- Financial capacity
- Licensing and certification, if applicable
- Safety record
- Ability to meet necessary response times for unscheduled work and emergencies

Agencies should consider whether to use a review committee and whether to use weighted evaluation criteria.

Examples of Personal Service Contracts and RFPs/RFQs

Below are some examples of personal services contracts. Again, remember that port districts and PUDs have certain statutory requirements, while all other local governments do not.

- [Bellevue RFP for Actuarial Services \(2012\)](#)
- [Port of Everett Personal Services Contract Procedures \(2008\)](#)
- [Port of Olympia Professional and Personal Services Selection Suite \(2008\)](#)
- [RiverCities Transit RFP for Transit Planning Services \(2012\)](#)
- [Shoreline Professional Services Contract for Traffic Data Gathering \(2011\)](#)
- [Stevens County RFQ for Civil Public Defender Services \(2017\)](#)

For other examples, see MRSC's [Sample Document Library](#).

Last Modified: January 23, 2019

Using Records Retention Schedules: What are Personnel Files?

Purpose: Provide guidance to local government agencies about appropriate retention of records filed in “personnel files”.

Personnel files are a convenient way to keep together a variety of records with different functions and purposes, all relating to a single employee. As each agency determines its own filing system(s) based on its unique business needs, there is no set standard governing which records may be found in a personnel file.

What records to file in a personnel file is an important agency decision *entirely separate* from the legal retention requirements for the individual records *within* the file.

Records retention schedules provide legal disposition authority based a record’s **function** and **purpose**. They do not provide disposition authority for filing *places* (such as folders, drawers, cabinets, or files).

With that in mind, the *Local Government Common Records Retention Schedule (CORE) Version 4.0* no longer contains a records series entitled “Personnel File”. Rather, it contains records series that provide legal disposition authority *by function* for all of the records routinely/commonly placed in a personnel file, including:

1. **Employee Health Records (Routine) (DAN GS2017-015)** (6 years after created or received and no longer needed for agency business);
2. **Employee Medical and Exposure Records (DAN GS50-04B-30)** (30 years after separation from agency);
3. **Employee Pay – History (DAN GS50-03E-15)** (4 years after end of fiscal year and no longer needed for agency business *[including retirement benefit verification]*);
4. **Employee Work History (DAN GS50-04B-06)** (6 years after separation from agency and no longer needed for agency *[including retirement benefit verification]*).

Washington State Archives recommends that agencies carefully consider what records to place in their personnel files. Each record should be analyzed (and, perhaps, organized) based on its **function** and **purpose**, keeping in mind each individual record’s:

- Minimum retention period(s);
- Confidentiality or level of “restricted access”;
- Disclosure status relating to the *Public Records Act* (chapter 42.56 RCW).

The Municipal Research and Services Center ([MRSC](http://mrsc.org)) has many examples of local government agency policy and procedure [manuals](http://mrsc.org/Home/Explore-Topics/Personnel/Local-Rules-and-Policies/Personnel-Policy-Manuals.aspx) covering personnel records and files. <http://mrsc.org/Home/Explore-Topics/Personnel/Local-Rules-and-Policies/Personnel-Policy-Manuals.aspx>.

Complete Chapter | RCW Dispositions

Chapter 40.14 RCW

PRESERVATION AND DESTRUCTION OF PUBLIC RECORDS

Sections

- 40.14.010** Definition and classification of public records.
- 40.14.020** Division of archives and records management—State archivist—Powers and duties—Duties of public officials.
- 40.14.022** Division of archives and records management—Imaging account.
- 40.14.024** Division of archives and records management—Local government archives account.
- 40.14.025** Division of archives and records management—Allocation of costs of services—Public records efficiency, preservation, and access account.
- 40.14.026** Division of archives and records management—Competitive grant program to improve technology information systems for public records and related training—Review of program and training services—Public records request log—Agency reporting requirements—Duties of the joint legislative audit and review committee.
- 40.14.027** Local government archives and records management services—Judgment debtor surcharge.
- 40.14.030** Transfer to state archives—Certified copies, cost—Public disclosure.
- 40.14.040** Records officers—Designation—Powers and duties.
- 40.14.050** Records committee—Composition, travel expenses, meetings, powers and duties—Retention schedules.
- 40.14.060** Destruction, disposition of official public records or office files and memoranda—Record retention schedules.
- 40.14.070** Destruction, disposition, donation of local government records—Preservation for historical interest—Local records committee, duties—Record retention schedules—Sealed records.
- 40.14.080** Chapter not to affect other laws.
- 40.14.100** Legislative records—Defined.
- 40.14.110** Legislative records—Contribution of papers by legislators and employees.
- 40.14.120** Legislative records—"Clerk," "secretary" defined.
- 40.14.130** Legislative records—Duties of legislative officials, employees and state archivist—Delivery of records—Custody—Availability.
- 40.14.140** Legislative records—Party caucuses to be advised—Information and instructions.
- 40.14.150** Legislative records—Use for research.
- 40.14.160** Legislative records—Rules for access to records.
- 40.14.170** Legislative records—Sound recordings.
- 40.14.180** Legislative records—Construction—Confidentiality of bill drafting records.

NOTES:

Materials specifically authorized to be printed and distributed by secretary of state: RCW 43.07.140.