



Okanogan County Auditor

Laurie Thomas, Auditor

Mila Jury, Chief Deputy Auditor

**PO Box 1010
Okanogan WA 98840
509-422-7240**

September 1, 2017

Business opportunity, request for proposals

The Okanogan County Auditor is seeking applicants for the operation of a vehicle/vessel license sub-agency office in the Methow Valley area.

Applications are made by submitting a written business proposal addressing specific subject areas. Your proposal will be part of a competitive replacement process. An outline of the subject areas to be addressed in the business plan is available at the Okanogan County Auditor's office, and may be accessed on-line at www.okanogancounty.org, then follow the Auditor link.

The Department of Licensing provides equal opportunity when appointing Subagents.

We encourage all qualified persons to apply, including members of protected groups under applicable state and federal law."

Please submit written business proposals to:

Okanogan County Auditor
Laurie Thomas
PO Box 1010
149 3rd Ave N
Okanogan, WA 98840
509-422-7240

ALL PROPOSALS MUST BE RECEIVED NO LATER THAN 4:30 p.m. October 6, 2017



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September 1, 2017

To: Vehicle/Vessel Licensing Applicants

From: Laurie Thomas, Okanogan County Auditor
Okanogan County Auditor's Office

RE: Request for Written Business Proposal

Okanogan County is now accepting written business proposals for a replacement vehicle/vessel license subagent office.

Attached is an outline of the subject areas to help you in your submission. The proposal should address each specific area.

Your submitted proposal will be part of a competitive appointment process. It is important that the questions are answered as thoroughly as possible, giving specific descriptive details. The proposal must be able to be taken apart for scanning or photo copies. Successful applicants in the written business proposal process will be scheduled for a personal interview.

Okanogan County will make a recommendation to the Director, State of Washington, Department of Licensing, who makes the final sub-agency appointment.

It is important to understand that we are asking for a proposal. We do not expect, nor do we require, signed leases, employment contracts or any obligation that is binding in any way.

Please submit **2 complete copies** of a written business proposal to **Okanogan County Auditor** either by mail or physical delivery:

Mailing Address:

Attn: Laurie Thomas, Auditor
PO Box 1010
Okanogan, WA 98840

Physical address:

149 3rd Ave N, Room 104
First floor County Court House
Okanogan, WA 98840

ALL WRITTEN PROPOSALS MUST BE RECEIVED NO LATER THAN 4:30 PM ON OCTOBER 6, 2017. FAX PROPOSALS WILL NOT BE ACCEPTED, AS WE CANNOT BE RESPONSIBLE FOR MISSING PAGES OR INCOMPLETE FAX TRANSMITTALS.

Proposals will not be accepted after that date and time.

BUSINESS PLAN PROPOSAL GUIDELINES

Background Experience

Please give specific, detailed descriptions and relate how this experience makes you qualified for operating a sub-agency contracted to perform a government service. All statements must be verifiable. References may be contacted for further verifications.

1. Experience

Personal Employment Experience

- 1.1. Nature of work
- 1.2. Description of job functions
- 1.3. Where, when, how long
- 1.4. References, recommendations

2. Business

- 2.1. Type of work
- 2.2. Where, when, how long
- 2.3. Size of business
- 2.4. Ownership of business

3. Management/Supervisory

- 3.1. How many people
- 3.2. Nature of work
- 3.3. Where, when, how long
- 3.4. References, recommendations

4. Financial

- 4.1. Budgeting
- 4.2. Forecasting
- 4.3. Checking, business accounts

Business Proposal

1. Staffing- requirement for sufficient staff for full service agency

- 1.1. List the number of full and or part time employees
- 1.2. If known, list names and addresses of the employees you are planning on hiring.

2. Staffing qualifications

- 2.1. Experience
- 2.2. Certifications
- 2.3. Description of job functions

3. Bonding/Insurance

- 3.1. Has the applicant ever been bonded and/or insured
- 3.2. Has the applicant ever been denied a bond?
If yes, describe the circumstances surrounding the denial.
- 3.3. Has the applicant ever been denied insurance?
If yes, describe the circumstances surrounding the denial.
- 3.4. Attach a letter from bonding company stating you'll be issued a fidelity bond in the amount specified in.
- 3.5. Attach a letter from the insurance company stating you'll be issued an insurance policy in the amount specified in Section 4.

4. Financial Condition

- 4.1. Provide documentation of adequate financial backing
- 4.2. Name and contact information of any financial backers
- 4.3. Current financial statements for applicant and any financial backers

5. Other Services

- 5.1. Will these DOL sub-agency services be offered in addition to other services
 - 5.1.1. An existing private business or service
 - 5.1.2. A planned new service
 - 5.1.3. Additional government services
- 5.2. If other services are being offered, is there any potential conflict between DOL services and the other services.

Proposed Business Site/Facility

Only one business site will be awarded to the chosen applicant under this proposal. However, the bidder can submit more than one site with the bid. Please provide a **separate profile of each business site** that you are proposing.

1. Location

- 1.1. Address

2. Office size

- 2.1. Total square footage
- 2.2. Have you provided adequate work space for employees, workstations, required inventory items, supplies and forms and comply with provisions of the Americans with Disabilities Act if required?
- 2.3. Is there sufficient customer waiting area to accommodate anticipated high volumes of business?
- 2.4. Is there sufficient display area and customer access to licensing related publications? (Brochures, applications, posters, etc.)
- 2.5. Floor plan.
A floor plan to include: 1. workstation location, 2. counter height and length, 3. data line entry, 4. dedicated power source, 5. secure storage, 6. diagram of available parking for disabled

3. Accessibility

- 3.1. Is the site easily accessible to the public? Is the site and facilities arranged in a manner that complies with the provisions of the Americans with Disabilities Act?
- 3.2. How many public parking spaces?
- 3.3. How many disability parking spaces?

4. Security

- 4.1. Have you provided a work area containing money, accountable inventory and licensing documentation inaccessible to anyone other than authorized licensing personnel?
- 4.2. Have you provided an area that excess inventory can be locked in a secure place?
- 4.3. Have you provided an area that during non-working hours, all money, accountable inventory and licensing documentation can be kept in a locked room or cabinet accessible only to authorized licensing personnel?
- 4.4. Does security maintain and restrict access to DOL automated equipment to authorized personnel?
- 4.5. Describe internal and external security.

5. Visibility

- 5.1. Describe your proposed placement of signs, inside and outside.

Purpose and Background of Subagents

What is a Sub-agency?

First and foremost, titling and licensing services are a government activity. Subagents, as privately operated businesses, are appointed by the State for the purpose of providing vehicle and vessel title and licensing services to the public, in addition to any other services allowable by law or by policy that may be appropriate. The use of subagents allows licensing services to be offered in more locations and in more convenient locations than just the County Courthouse.

The appointment itself is not a business per se and there are no owners in the usual sense. The appointment cannot be sold, traded or otherwise transferred to a different person or persons. If the appointee is an established business at the time of application, the owners of the business are the appointees and if the business changes ownership, the appointment is canceled and subject to procedures for appointment of a replacement Sub-agency.

What are the Levels of Authority?

The Legislature has created laws to govern the licensing and titling of vehicles and vessels. The Department of Licensing (DOL) has been charged by the Legislature with this responsibility. DOL has been authorized to appoint Agents (County Auditors) and subagents to assist them in the performance of these duties.

The Agent (County Auditor) reports directly to DOL. The number of subagents for a particular county is determined primarily by the number of transactions that occur in that county. Subagents are selected by the Agent through a competitive proposal process.

The Agent is responsible for the training, monitoring, oversight and auditing of the subagents within their jurisdiction.

What is the Nature of the Work?

Operating a vehicle/vessel licensing sub-agency is essentially and most importantly a public service. Members of the public seek a full range of vehicle/vessel licensing services. The sub-agency **must provide** full motor vehicle licensing services; examples include:

- Preparing and processing original ownership of vehicles/vessels and issuing duplicates for the same;
- Processing annual renewals of vehicle/vessel licenses and issuing duplicates for the same;
- Preparing and processing registration documents;
- Preparing permits, tonnage and specialized registrations (*ie*, farm vehicles, snowmobiles);
- Receiving and controlling all accountable inventory associated with licensing; and
- Providing all services related to disability parking transactions.

What does DOL provide?

Unlike private operations, much of the operation of this service is provided by the State of Washington through DOL. Tangible and intangible items include:

- Written policies and procedures for conducting transactions;
- Equipment related to licensing transactions:
 - Statewide software system
 - Desk computers connected to statewide system;
 - Printers;
- Forms;
- Specialized paper; and
- Accountable inventory, including plates, tabs, placards, and permits.

What does the Subagent provide?

The owner of a sub-agency must provide the remaining aspects of the business, some of which must meet specific conditions set by DOL:

- An adequate, secure office space,
 - Including sufficient and convenient public access and parking that meets ADA accessibility requirements;
- Adequate staff, in terms of numbers and training, to meet public demands for Service. **Hours of operation**, at a minimum of 7 hours daily during normal business hours Monday through Friday. Subagents may offer extended customer service hours, including Saturdays.
 - Staff must be tested and certified by the Agent before processing licensing and titling transactions on the statewide software system, which requires training, experience and successful completion of testing.
 - Staffing levels must be sufficient to ensure that the public is served in a timely manner. Staffing levels should take into account breaks, lunches, sick and vacation time.
 - Staff must attend continuing training sessions presented throughout the year.
- Basic business equipment, such as phones, calculators, work space, and cash drawers;
- Insurance and bond coverage with the name insured as Okanogan County and State of Washington, Department of Licensing and must require the insurer to provide thirty day written notice of any cancellation or alteration of the endorsement or policy. All bonds must be issued by a company authorized to transact surety business in the state of Washington and acceptable to DOL:
 - Fidelity bond of the amount specified in agency specific information. The bond is to provide fidelity coverage for any fraudulent or dishonest act committed by the subagent or by a subagent employee;
 - Insurance coverage equal to the replacement cost of the state property (including the loss of monies and/or securities) in the subagent's

- possession, including fire, casualty, vandalism, and malicious mischief, at a minimum;
- Insurance against robbery inside and outside the premises. Policy must include the actual value of license tabs and license plate replacement costs as well as money; and
- A checking account at a local bank in the name of the Department of Licensing, Agency Account, Sub-agency Name, Subagent. Signatures on the account include representatives of DOL, Agent and subagent. The bank must accept electronic withdrawals and deposits.

How is the subagent paid?

Subagents receive a fee per transaction completed. The fees retained by the subagent are \$12 for each title and \$5 for each tab renewal.

The state and county portions of the fees are transferred daily. The state performs an electronic withdrawal on a daily basis. The subagent writes a check daily to the County.

Sub-agency Application Checklist

All application package material must be submitted to the proper address or hand delivered to the Auditor's Office on the first floor in the County Courthouse by the due date. Late, faxed or incomplete applications will not be considered.

Please provide the information in the order below:

1. **Vehicle/Vessel Licensing Subagent Application:** This application must be completed and signed by all applicants.
2. **Business Proposal Responses:** This section should provide details about your background and your business plan. Please number your responses to match the questions. Arrange your responses in separate tabs:
 - A. Background Experience
 - B. Business Proposal – ensure that letters from the insurance company and financial statements are included as part of your response
 - C. Proposed Business Site/Facility

Agency Specific Information – Methow Valley Area

This appointment is a replacement sub-agency that will be in the same general locality or will operate in the same physical area and serve the same clientele as the previous sub-agency that is being replaced.

Physical location:

This sub-agency will serve the Methow Valley area.

The approximate boundaries in which the sub-agency is to be located are within the city limits of Twisp or Winthrop, WA.

Maps are included for reference.

Number of Staff:

The number of trained staff, including management positions, for this sub-agency is estimated to be 1 FTE and 1 part-time or “back-up” Licensing Representative.

Number of Workstations:

The number of authorized workstations for this sub-agency is 1.

Hours of Operation:

This sub-agency must be in operation, at a minimum, 7 hours daily during normal State business hours Monday through Friday. Extended hours between 7 a.m. and 7 p.m. may be offered, as well as Saturdays. Sub-agencies will observe the normal State holiday schedule for closures.

Bonding or Insurance Requirements:

The minimum bond or insurance requirements for this sub-agency is \$15,000.00 with a deductible of \$2,000 or less.

Google Maps Winthrop



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Google Maps Twisp



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