



Request for Proposal

**Subagency Replacement
for
Bellingham Auto Licensing**

Whatcom County Auditor's Office
Licensing Division

Debbie Adelstein, Auditor
Stacy Henthorn, Licensing Supervisor

**Application Submission Deadline:
June 21, 2019
4:30 pm**

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**Whatcom County
Auditor's Office**

Whatcom County Courthouse
311 Grand Avenue, Suite 103
Bellingham, WA 98225-4038
Phone: (360) 778-5100
Email: auditor@co.whatcom.wa.us
Internet: www.whatcomcounty.us/auditor



Debbie Adelstein
County Auditor
Diana Bradrick
Chief Deputy Auditor

To: Vehicle/Vessel Licensing Applicants
From: Debbie Adelstein, County Auditor
Re: **Request for Business Proposal – Department of Licensing Subagent**
Date: May 16, 2019

Whatcom County is now accepting written business proposals for a replacement vehicle/vessel license subagency office in the central/south **BELLINGHAM** area of Whatcom County. A map, including the area in which the subagency must be located, is enclosed with this application.

Attached is information to help you in your submission. Your submitted proposal will be part of a competitive appointment process. It is important that you answer the questions as thoroughly as possible giving specific descriptive details.

Interested applicants must meet, at a minimum, the following criteria:

1. Suitability of location, which will provide adequate service to the public;
2. Defined operating hours including a minimum of 6 hours on Saturdays;
3. Public parking including disabled accessibility;
4. Must be able to meet bond and insurance requirements;
5. Must meet state mandated record keeping and reporting requirements;
6. Must attend mandatory training sessions in Whatcom County;
7. Must maintain required certification annually through continuing education;
8. Must provide adequate trained staff to meet technical and public service level requirements;
9. Must meet and maintain performance standards set by Whatcom County Auditor's Office and the State of Washington Department of Licensing;
10. Agree to comply with Equal Opportunity and human rights laws;
11. Agree to provide full vehicle and vessel licensing services;
12. Agree to establish a special Subagent/Department of Licensing Agency bank account;
13. Enter into a contractual agreement that is binding upon the subagent and subagent employees.

Successful applicants in the written phase will then participate in an oral interview process. Applications are to be returned to the Auditor's Office **no later than 4:30 pm, June 21, 2019.**

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.

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. At the completion of this process, Whatcom County will make a recommendation to the Director, State of Washington, Department of Licensing, who makes the final subagency appointment.

Questions regarding the application packet can be emailed to shenthor@co.whatcom.wa.us and must be received no later than 4:30 pm on June 7, 2019. Answers to questions will be posted on the Whatcom County Auditor's website at: <http://www.co.whatcom.wa.us/199/auditor/> on June 12, 2019.

Submit business proposal by mail, in person, or by email to:

Whatcom County Auditor
Attn: Stacy Henthorn
Whatcom County Courthouse
311 Grand Avenue, Suite 103
Bellingham, WA 98225
shenthor@co.whatcom.wa.us

Proposals must be received no later than 4:30 pm, June 21, 2019. Proposals will not be accepted after that date and time.

Purpose and Background of Subagents

What is a Subagency?

First and foremost, titling and licensing services are a government activity. Subagents, as privately operated businesses, are appointed by the Washington State Department of Licensing 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 subagency.

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 subagency is a public service. Members of the public seek a full range of vehicle/vessel licensing services. The subagency **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);
- Calculating, collecting, depositing and reporting of associated fees;
- 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
- Accountable inventory, including plates, tabs, placards, and permits

What does the Subagent provide?

The owner of a subagency 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.
 - 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. Attendance is mandatory.
- Basic business equipment, such as phones, calculators, work space, and cash drawers.
- Insurance or bond coverage from a Washington authorized insurance company or surety business. The policy must require the insurer to provide thirty day written notice of any cancellation or alteration of the endorsement or policy. The insurance deductible shall not exceed \$2,500. 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.

- A checking account at a local bank in the name of the Department of Licensing, Agency Account, Subagency 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 for each completed transaction. 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 and county performs an electronic withdrawal on a daily basis.

Subagency Application Checklist

All application package material must be submitted to the address listed on page 3 of this proposal by the June 21, 2019 deadline. *Late, faxed, or incomplete applications will not be considered.*

Submit the information in the following order:

1. **Vehicle/Vessel Licensing Subagent Application form (Pages 17 - 18):** This application must be completed and signed by all applicants.
2. **Business Proposal Responses (Pages 12 - 15):** The questions in this section provide detail about your background and your business plan. Number your responses to correspond with the questions. Arrange your responses in separate tabs:
 - I. Experience
 - II. Staffing
 - III. Business Site/Facilities
 - IV. Business Services
 - V. Financial Aspects/Capitalization
 - VI. Bonding and/or Insurance
 - VII. Community Relationship/Involvement
 - VIII. Related Information

Evaluation Criteria

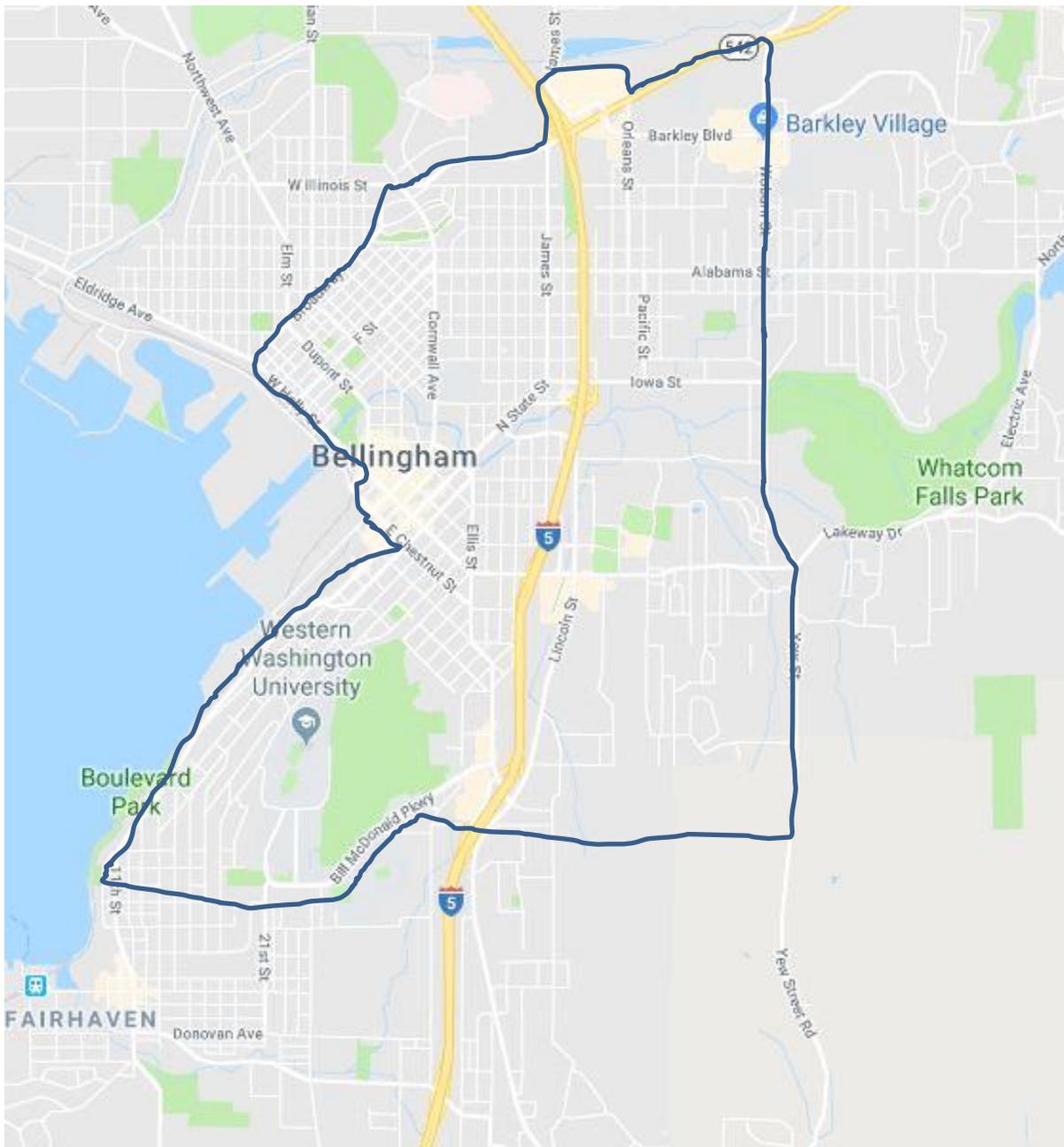
Applicants will be evaluated on experience and business proposal. Interested applicants must meet, at a minimum, the following criteria:

1. Suitability of location, which will provide adequate service to the public;
2. Defined operating hours including a minimum of 6 hours on Saturdays;
3. Public parking including disabled accessibility;
4. Bond/insurance requirements;
5. State mandated record keeping and reporting requirements;
6. Attendance at mandatory training sessions;
7. Maintenance of required certification annually through continuing education;
8. Adequate trained staff to meet technical and public service level requirements;
9. Maintenance of performance standards set by Whatcom County Auditor's Office and Washington State Department of Licensing;
10. Compliance with Equal Opportunity and human rights laws;
11. Provision of full vehicle and vessel licensing services;
12. Establishment of a special Subagent/Department of Licensing Agency bank account;
13. Criminal and credit check to be performed on apparent appointee prior to recommendation.
14. Enter into a contractual agreement that is binding upon the subagent and subagent employees.

Subagency Specific Information and Statistics

This appointment is for a *replacement* subagency. It shall be located in the central/south Bellingham area of Whatcom County. The subagency will serve the same clientele as the previous subagency.

The approximate boundaries in which the subagency is to be located are within the city limits of Bellingham, WA. See map below as reference.



Number of Staff:

The number of trained staff, including management positions, for the subagency is estimated to be six (6).

Persons with previous business ownership, supervisory, and/or management experiences are preferred. Previous vehicle/vessel licensing experience is not required but could be beneficial.

Number of Workstations:

The number of authorized workstations for the subagency is five (5).

Hours of Operation:

The subagency must be in operation during normal state business hours, Monday through Friday, with a minimum of six (6) hours on Saturdays. Subagents may offer extended customer service hours beyond normal business hours. DRIVES, DOL's operating system, is available to process transactions between the hours of 6:00 am to 8:30 pm, Monday through Saturday. DRIVES is not available on Sunday or state holidays and transactions may not be processed on those days.

Bonding or Insurance Requirements:

The fidelity bond or insurance requirement for this subagency is a minimum of \$100,008.00 for the first year.

Statistics of Transaction Counts:

Following is the history of transaction counts for the subagency that is being replaced:

<u>Year</u>	<u>Title Transactions</u>	<u>Renewal Transactions</u>
Through March 31, 2019	3,978	10,174
2018 -	20,005	44,571
2017 -	22,404	43,815
2016 -	19,386	42,651

Business Plan Proposal - Guidelines

Please give specific, detailed descriptions and relate how this experience makes you qualified to operate a subagency contracted to perform a government service. All statements must be verifiable. References will be contacted as part of the selection process.

I. EXPERIENCE

A. Personal Employment Experience

1. Nature of work (description of job functions)
2. Where, when, how long
3. References, recommendations

B. Business Ownership Experience

1. Type of work or product
2. Where, when, how long
3. Business references
 - a) Customer references (two minimum)
 - b) Trade or industry references (two minimum)
 - c) Business banking references (one minimum)
4. Size of business
 - a) Annual gross receipts
 - b) Number of employees
5. Financial aspects
 - a) Type of financial accounts
 - b) Where, when, how long
6. Disposition of business
7. Employee theft or embezzlement history

C. Management/Supervisory Experience

1. Supervisor or manager
 - a) Number of staff supervised
 - b) Where, when, how long
2. Nature of work
3. References (two minimum)

D. Financial Experience (List examples to illustrate experience in handling and reconciling accounts)

1. Checking Accounts
 - a) Personal
 - b) Business
 - c) Custodial
2. Budgeting, forecasting, inventory management
3. Provide documentation of adequate financial backing
4. Current financial statements for applicant and any financial backers

E. Vehicle/Vessel License Experience

1. Nature of Work
 - a) Description of job functions
2. Where, when, how long
3. Reference and/or letter of recommendation

II. STAFFING

A. Experience Hiring Employees

1. List previous experience hiring employees
2. List qualifications you look for in employees
3. Discuss your planned level of involvement with the subagency (i.e. will work full time, part time, hire a manager, etc.)
4. Identify any potential employees with licensing experience that will be employed at the new subagency; include certifications

III. BUSINESS SITE/FACILITIES

A. Public Access and Parking

1. How many public parking spaces
2. How many ADA parking spaces and do they provide for accessibility

B. Location (potentials)

1. Building address
2. Description of building including square footage
3. Office Floor Plan
 - a) Public areas:
 - i. Customer service counter
 - ii. Waiting/reception area
 - b) Secure storage area for inventory
 - c) ADA accessibility requirements for workstation(s) and public areas

C. Security

1. Internal
 - a) Have you provided a work area containing money, accountable inventory and licensing documentation inaccessible to anyone other than authorized licensing personnel?
 - b) An area that excess inventory can be locked in a secure place?
 - c) 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?
 - d) Does security maintain and restrict access to DOL automated equipment to authorized personnel?
2. Exterior Security – Describe.

D. Sign Placement - Describe

1. Inside
2. Outside

IV. BUSINESS SERVICES

- A. Is it going to be a stand-alone business (subagency will be only business operating at the site selected)?
- B. Will it be a co-located business (subagency will be run in conjunction with another business at same site)
 1. Please describe nature of other business functions at subagent site
 2. Address any potential conflict between DOL services and other services

V. FINANCIAL ASPECTS/CAPITALIZATION

- A. Lease, rental, ownership of building, premises and equipment
- B. Advertising plan, including anticipated budget
- C. Capital outlay/Investment

VI. BONDING and/or INSURANCE

A. Bonding/Insurance history

1. Prior or current bond(s) or insurance
2. Describe circumstances surrounding any denial of bond or insurance

B. Claims against insurance

1. Embezzlement
2. Employee theft
3. Other

C. Pre-approval letters from carriers (stating you are approved)

VII. COMMUNITY INVOLVEMENT IN BELLINGHAM AREA

- A. Resident of Community and involvement; where, when, how long
- B. Business in Community and involvement; where, when, how long
- C. Neighborhood/Community involvement; where, when, how long
- D. Other Civic Involvement; where, when, how long

VIII. RELATED INFORMATION

- A. Provide an explanation of additional relevant factors that may aid in our selection process.

Cost Suggestions

Listed below are some of the costs you may incur doing business as a subagent:

General Costs

- Rent or lease
- Taxes (local, State, Federal)
- Insurance
- Bond
- Remodeling
- Photo copying services
- Office furniture and counters
- Messenger or common carrier
- Publications, (Vehicle appraisal guides, zip code)
- Accountant fees
- Agent fees
- Parking facility
- Attorney fees
- Office supplies
- Janitorial
- Banking charges
- Membership dues
- Advertising
- Signage
- Utilities
- Yellow page listing

Equipment

- Installation of communication lines for DOL equipment
- Telephone
- Fax machine
- Safe or vault
- Security system
- Answering machine
- Copy Machine

Personnel

- Salaries
- Benefits
- Insurance
- L & I insurance
- Travel

Vehicle/Vessel Licensing Subagent Application

You can use this form to apply as a new subagent, change a subagent business name, subagent replacement, remove an appointee, or report an office move. Send completed form to **Vehicle and Vessel Operations, PO Box 9042, Olympia, WA 98507-9042.**

Application type:

- New subagent
- Change of subagent business name
- Replacement subagent
- Remove appointee(s)
- Office move

Subagency Information

TYPE or PRINT Subagency licensed business name (as filed with Master License Services)			
Name business will do business as (if different from above)			
Address			
City	State	ZIP code	County
Mailing address, if different (Address, City, State, ZIP code)			
(Area code) Telephone number	(Area code) Fax number	Email	
Proposed business open date (mm/dd/yyyy)	Days and hours of operation Day(s) _____ Hours _____		
Business ownership structure (as provided through open competitive process)			
<input type="checkbox"/> Sole proprietor	<input type="checkbox"/> Association	<input type="checkbox"/> Partnership (define type) _____	
<input type="checkbox"/> Municipality	<input type="checkbox"/> Trust	<input type="checkbox"/> Corporation (define type) _____	
State where incorporated/formed _____		Year incorporated/formed _____	

Subagent applicants/ appointees – List all names of applicants/ appointees for this business as provided through the open competitive process. Attach additional pages if needed.

1 Name (Last, First, Middle)			Business title	
Address (Residence or mailing)		City	State	ZIP code
(Area code) Home telephone number		(Area code) Cell phone number		
2 Name (Last, First, Middle)			Business title	
Address (Residence or mailing)		City	State	ZIP code
(Area code) Home telephone number		(Area code) Cell phone number		
3 Name (Last, First, Middle)			Business title	
Address (Residence or mailing)		City	State	ZIP code
(Area code) Home telephone number		(Area code) Cell phone number		
4 Name (Last, First, Middle)			Business title	
Address (Residence or mailing)		City	State	ZIP code
(Area code) Home telephone number		(Area code) Cell phone number		

Subagent applicants/appointees – continued

Applicant/Appointee signatures			
X _____ Signature	_____ Date	X _____ Signature	_____ Date
X _____ Signature	_____ Date	X _____ Signature	_____ Date
<p>Answer the following</p> <p>Have any of the applicants/appointees been convicted of a misdemeanor or felony within the past 7 years that might unfavorably affect their appointment as a subagent? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, please explain:</p> 			

County Auditor/ Agent

<ul style="list-style-type: none"> • I am confident the applicant(s)/ appointee(s) is able to and will perform all duties required of a vehicle/vessel license subagency, and if appointed, will be fully trained and meet banking, bonding, and insurance requirements included in the standard contract and applicable Department of Licensing (DOL) Policies and Procedures. • This office will educate, train, and qualify the applicant as provided in the standard agent contract and DOL Policies and Procedures. • I have reviewed and verified the information provided in this application is accurate. 			
<table style="width: 100%; border: none;"> <tr> <td style="border: none;">_____ Name of county</td> <td style="border: none; text-align: center; vertical-align: middle;">X</td> <td style="border: none;">_____ County Auditor/ Agent signature</td> </tr> </table>	_____ Name of county	X	_____ County Auditor/ Agent signature
_____ Name of county	X	_____ County Auditor/ Agent signature	

Department use only		
<p>Appointing authority approval/disapproval</p> <p><input type="checkbox"/> Approve <input type="checkbox"/> Disapprove</p> <p>If disapproved, please explain: _____</p> <p>_____</p> <p>_____</p>		
<table style="width: 100%; border: none;"> <tr> <td style="border: none;">_____ Director signature</td> <td style="border: none;">_____ Date</td> </tr> </table>	_____ Director signature	_____ Date
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