



REQUEST FOR PROPOSAL

Employee Offboarding Framework Assessment

(Including Logical Access, Physical Security & Asset Return | ITSM-Based)

Issue Date: July 10, 2026

RFP Reference No.: RFP26.10.002

COWLITZ INDIAN TRIBE

1055 9th Avenue
Longview, WA 98632



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Employee Offboarding Framework
Assessment

July 6, 2026

CONFIDENTIALITY STATEMENT

This **Request for Proposal (RFP)** and any attachments are confidential and proprietary to the **Cowlitz Indian Tribe (the Tribe)** and are intended solely for use in preparing a response to this solicitation. Unauthorized use, disclosure, reproduction, or distribution is strictly prohibited. If you received this document in error, please notify the Tribe immediately and destroy all copies.

Questions or concerns regarding this RFP should be directed to the Point of Contact below.

1. RFP Summary

Item	Details
Issuing Entity	Cowlitz Indian Tribe (“CIT” or “The Tribe”)
RFP Title	Employee Offboarding Framework Assessment
Point of Contact	Christopher Zuzow, Assistant Tribal Manager
Contact Email / Phone	citadminrfps@cowlitz.org / 360.827.0107
Questions Due	July 24, 2026, at 5:00 PM PDT
Proposal Due Date	August 7, 2026, at 5:00 PM PDT
Submission Method	Email (PDF) to: citadminrfps@cowlitz.org
Subject Line	“RFP – Employee Offboarding Framework Assessment – [Company Name]”
Anticipated Interviews	As Needed
Anticipated Award	September 2026
Anticipated Start	October 2026



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SUBMISSION INSTRUCTIONS

Please submit proposals via email to: citadminrfps@cowlitz.org

Subject line: “RFP – Employee Offboarding Framework Assessment – [Company Name]”

Proposals must be received no later than the date and time indicated above.

2. Sovereign Status; Non-Waiver

The Tribe is a federally recognized sovereign Tribal Nation.

Nothing in this RFP, the Tribe’s issuance of this solicitation, evaluation of proposals, communications with vendors, selection of any vendor, or any subsequent negotiations shall be construed as a waiver of the Tribe’s sovereign immunity.

3. Background

The Cowlitz Indian Tribe (CIT) is a sovereign Tribal government and a growing presence in community development across Clark, Cowlitz, Lewis, and portions of Pierce, Skamania, and Wahkiakum counties. Since achieving federal recognition in 2000, the Tribe has experienced sustained growth and now employs close to 500 individuals.

CIT is committed to protecting and serving its people, resources, and cultural heritage while delivering programs and services to support the health, well-being, and economic stability of more than 5,000 Tribal members and program participants. The Tribe administers a broad range of governmental and community-focused programs supported by a network of administrative and departmental functions to ensure effective governance, operational efficiency, and service delivery.



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4. Project Overview, Goal, and Timeline

The Tribe seeks a qualified firm to conduct a comprehensive assessment of existing CIT Tribal government employee offboarding policies, procedures, and internal controls, i.e., the employee offboarding framework. This project will focus on enhancing and standardizing CIT government termination and deactivation processes across systems, financial access/authorization, physical security, and asset management. The engagement will leverage the existing IT ticketing system (e.g., Samanage) for automated ticketing workflows, audit traceability, and end-to-end process visibility.

The goal of this initiative is to establish a robust integrated CIT Tribal government framework that ensures secure, timely, and fully auditable offboarding practices, while strengthening alignment with organizational governance, risk management, and compliance requirements.

The framework shall be designed with scalability and flexibility to adapt to future system enhancements, upgrades, or transitions to alternative platforms, ensuring long-term sustainability and consistent control effectiveness over time.

The selected **firm must be able to commence the assessment within thirty (30) days of an executed contract with an agreed upon estimated project timeline for project deliverables.**

The selected firm will work closely with the Tribe's Administration, Compliance, HR, and IT teams.

5. Project Objectives

- A. Ensure timely and complete deactivating of separated employees across the CIT government
- B. Mitigate risk of unauthorized access to CIT systems, financial and authorization mechanisms, mobile and wireless telephony, equipment, vehicles, and facilities post-termination
- C. Identify notification and data needs for integrated end-to-end tracking utilizing IT ticketing
- D. Strengthen internal controls in alignment with COSO and ITGC frameworks
- E. Enable asset recovery and physical security compliance
- F. Deliver audit-ready documentation and evidence retention

6. Key Deliverables

- A. Future-state process maps (end-to-end termination lifecycle)
- B. Ticket workflow modeling design and documentation
- C. Risk & Control Matrices (including HR, IT, telephony, financial, physical security, assets)
- D. Policy and SOPs documentation
- E. Communications plan
- F. Audit-ready evidence framework (ticketing + documentation)



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7. Scope of Work

Each proposal must include a Scope of Work that details each stage of work identified below and provides an estimated implementation timeline for each component.

A. Current State Assessment

- i. Leveraging internally developed assessment, evaluating the existing processes for:
 - a. HR notification procedures
 - b. IT and telephony deprovisioning
 - c. Revocation of financial access and authorization, credit cards, WEX, and LOCs
 - d. Physical access removal
 - e. Asset return processes
- ii. Assess ticket workflow for integrations
- iii. Identify gaps, risks, delays, and control weaknesses

B. Future State Process Design

- i. Design an CIT Tribal government standardized and integrated end-to-end offboarding process:
 - a. HR-triggered termination notifications
 1. Establish a standardized communication process to notify all CIT entities of employees separated from service and designated as ineligible for rehire.
 - b. IT termination ticket form, content, and data gathering fields (Section C)
 - c. IT ticket integrated and/or parallel workflows for:
 1. IT and telephony access removal
 2. Revocation of financial access and authorization mechanisms
 3. Physical security deactivation
 4. Vehicle access removal
 5. Asset recovery and validation
 - d. Data protection and retention determination protocols
 1. Data ownership reassignment (OneDrive, shared drives)
 2. Email retention/forwarding rules
 3. Compliance with retention/legal hold policies
- ii. Define departmental SLAs (e.g., same-day or within 24 hours)
- iii. Define escalation procedures, and exception handling

C. ITSM Workflow Enhancements

- i. Evaluate termination ticket for routing and notification to the appropriate teams for:
 - a. IT and telephony (access)
 - b. Financial and authorization mechanisms (access)
 - c. Security (badge access)
 - d. Facilities and vehicle (keys and access)



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D. Internal Controls Design & Documentation

- i. Develop and formalize controls as documented in a risk control matrix (RCM)
 - a. Logical Access Controls
 1. Immediate system deactivation upon termination date
 2. Verification of access removal across all critical systems
 3. Financial access and authorization to credit cards, WEX, and LOCs revocation
 4. Telephony
 - b. Physical Security Controls
 1. Deactivation of badge, facility, vehicle access on or before termination
 2. Retrieval or deactivation of keys, access cards
 - c. Asset Return Controls
 1. Mandatory asset return checklist (laptops, phones, badges, peripherals)
 2. Tracking and verification of returned assets
 3. Escalation process for unreturned items
 - d. Governance Controls
 1. Segregation of duties (HR initiation vs. IT/Security execution)
 2. Independent review and approval of task completion

E. Policy & SOP Development

- i. Create or enhance:
 - a. Employment termination policy
 - b. Deactivation procedures
 - c. Physical security and access control policy
 - d. Asset return and accountability procedures
 - e. Ticket handling SOPs

F. Reporting/Dashboarding

- i. Develop reporting/dashboards for:
 - a. Identification of CIT tribal governmental premises: Separated employees and CIT tribal members not in good standing
 - b. Termination ticket lifecycle performance
 - c. SLA compliance (IT, physical security, asset return)
 - d. Exception tracking and trends
 - e. Enable compliance/audit and management reporting

G. Issue Remediation & Continuous Improvement Mechanisms

- i. Control failures or delays
- ii. Root cause analysis documentation
- iii. Recommend and implement improvements to process and controls



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H. Control Testing & Monitoring Framework

- i.** Develop testing procedures for:
 - a.** Timeliness of ticket creation and closure
 - b.** Completion of all deactivation tasks
 - c.** Physical access removal validation
 - d.** Asset return completeness
- ii.** Establish KPIs such as:
 - a.** % of access revoked within SLA
 - b.** % of assets returned prior to termination or within defined window
 - c.** Exception rates and unresolved tickets

I. Audit and Compliance Support

- i.** Ensure audit-ready documentation for
 - a.** Risk Control Matrices (See Section D above)
 - b.** Evidence logs



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8. Quotes/Costs

Vendors must provide a comprehensive and transparent cost proposal that includes all fees associated with the Statement of Work and Deliverables noted above.

9. Terms, Conditions, and the Tribe's Rights

The Tribe reserves the right to reject any or all proposals; request clarifications; conduct interviews; verify references; negotiate terms; modify scope, portfolio assignments, or timelines; or cancel and reissue this RFP at any time.

Contract Terms; Sovereign Protections; Required Disclosures

- A. Sovereign Immunity; No Waiver:** Nothing in this RFP, the Tribe's issuance of this solicitation, evaluation of proposals, communications with proposers, selection of any proposer, or any subsequent negotiations shall be construed as a waiver of the Tribe's sovereign immunity. Any waiver of sovereign immunity must be expressly authorized by written action of Tribal Council and, if granted, shall be specific and limited to the particular matter identified in the written authorization.
- B. Confidentiality; Non-Disclosure Agreement (NDA):** As a condition of participation in this RFP process, vendors may be required to execute the Tribe's standard Non-Disclosure Agreement (NDA) prior to receiving any non-public, confidential, or sensitive information relating to this procurement or participating in subsequent stages of the evaluation process.
- C. Dispute Resolution; No Arbitration/Mediation:** The Tribe does not agree to mandatory arbitration or mediation provisions. Any dispute resolution mechanism proposed by a proposer—including arbitration, mediation, or consent to jurisdiction—must be expressly disclosed in the proposal. The Tribe will not accept any dispute resolution provision that requires arbitration or mediation unless expressly authorized in writing by Tribal Council.
- D. Indemnification:** The Tribe does not agree to indemnification provisions that require the Tribe to indemnify, defend, or hold harmless the proposer or any third party. Any indemnification clause proposed by a proposer must be expressly disclosed in the proposal. The Tribe will not accept any provision that implies or requires a waiver of sovereign immunity or obligates the Tribe to indemnify, defend, or hold harmless another party unless expressly authorized by Tribal Council.
- E. Governing Law; Venue; Jurisdiction:** Any proposed terms regarding governing law, venue, jurisdiction, choice of forum, or service of process must be expressly disclosed in the proposal. The Tribe will not accept terms that subject the Tribe to state court jurisdiction, impose a non-Tribal forum, or otherwise imply a waiver of sovereign immunity, unless expressly authorized by written action of Tribal Council.
- F. Limitations of Liability; Fiduciary Duties; Standard of Care:** Any limitation of liability, limitation of remedies, disclaimer of consequential damages, or waiver/disclaimer of fiduciary



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responsibility proposed by a proposer must be expressly disclosed in the proposal. The Tribe will not accept any term that limits or disclaims the proposer's fiduciary duties, the Prudent Investor Standard, or the duty of care owed to the Tribe.

- G. Vendor Standard Terms and Conditions; Required Submission with Proposal:** All proposers must submit all proposed terms and conditions with their proposal, including without limitation: (i) the proposer's standard agreement and any exhibits/schedules; (ii) any account agreements, fee schedules, side letters, service agreements, platform agreements; (iii) privacy/cybersecurity addenda and data processing terms; (iv) any custodial or third-party platform terms the proposer requires the Tribe to sign; and (v) any policies incorporated by reference into proposer contracts. Failure to submit these materials may render the proposal non-responsive. Failure to submit vendor standard terms and conditions, including terms incorporated by reference, may render a proposal non-responsive.
- H. Tribe Rights; Rejection of Unacceptable Terms:** The Tribe reserves the right to deem a proposal non-responsive if it contains unacceptable legal terms, including but not limited to arbitration, mediation, indemnification by the Tribe, waiver of sovereign immunity, improper venue/jurisdiction provisions, or limitations that reduce fiduciary duties. The Tribe may require proposers to revise or remove unacceptable terms as a condition of further consideration or award.

10. Proposal Format and Required Content

Proposals should be concise, clearly organized, and structured according to the sections outlined below. Proposals must provide sufficient details to allow the Tribe to evaluate the consultant's experience, technical capabilities, security controls, and ability to provide the deliverables and perform the statement of work identified above.

A. Signed Cover Letter

- i. A brief summary of the firm's qualifications and experience relevant to the RFP
- ii. Acknowledgement of the Tribe's sovereign immunity and non-waiver provisions
- iii. Confirmation that the firm has reviewed and agrees to the RFP requirements
- iv. Primary contact information for the proposal

B. Firm Profile

- i. Legal name and headquarters location
- ii. Years in business
- iii. Organizational structure and ownership



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C. Indicate previous experiences or examples with Tribal or other Government Programs

Provide examples of similar programs implemented for (include program size, scope, and duration where possible):

- i. Tribal governments
- ii. State or local governments

D. References

- i. Please provide at least three references, contact information, and brief description of the project with the organizations for which similar services have been provided.
 - a. **Preference may be given to vendors with Tribal government experience.

E. Required Attachments

Proposals must include the following attachments or indicate that they do not apply to Vendor. Failure to include required attachments may result in the proposal being deemed non-responsive.

- i. **SOC 1 Type II and/or SOC 2 Type II reports**
- ii. **Proof of insurance coverage(s)**, including certificates of insurance for all applicable policies.
- iii. **Proposed agreements or standard vendor terms and conditions.**
- iv. **Client references and experience summary**, including prior experience supporting Tribal governments or similar public-sector programs, if applicable.
- v. **Detailed fee schedule**
- vi. **Any additional certifications, regulatory licenses, or compliance documentation**
- vii. **Disclose any material litigation, investigations, regulatory enforcement actions, or adverse findings** involving the firm, its affiliates, or key personnel within the past **ten (10) years**.
- viii. **Certify that the firm is not suspended or debarred** and is not otherwise prohibited from contracting with **federal, state, or Tribal governments**.
- ix. **Disclose any past or pending actions** that could reasonably impact the proposer's ability to perform the services described in this RFP.



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11. Evaluation Process and Selection Criteria

The Tribe may evaluate proposals using weighted criteria, including but not limited to:

- i. Experience and qualifications (Tribal/government)**
 - a.** The Tribe may evaluate proposals using weighted criteria, including but not limited to, the application of Tribal Preference, which allows qualified Native-owned businesses to receive priority and be selected even if not the lowest bidder, provided their bid falls within specified percentage thresholds above the lowest non-Tribal bid.
- ii. Compliance, risk management, and internal controls (incl. SOC)**
- iii. Transparency and completeness of pricing, including disclosure of all fees and cost drivers.**
- iv. Reporting quality and governance alignment**

The Tribe may request interviews, presentations, references, or additional documentation.

12. Exhibits / Appendices

- i. CIT Logo Brand Guidelines 2026**
- ii. CIT Policy and Process Documentation Guidelines 2026**