



IDAHO

Department of Administration

STATE DIVISION OF PURCHASING

REQUEST FOR PROPOSAL



PROCUREMENT OF SERVICES

- Typically Services are procured through a Request for Proposals (RFP), where cost is NOT the predominant evaluated factor
- Agencies will determine the qualitative factors and the relative weights (what is most important in obtaining the best service at the best price? Experience? Quality of staff? Proposed Plan of Service?)
- If you review the RFP and find ambiguities or disagree with the approach/scope/etc. bring that forward in the question and answer period – or contact the solicitation lead with a specific concern
- RFPs focused on service will contain a scope of work, typically developed by the agency subject matter expert (SME)

DOs AND DON'Ts OF SUBMITTING A PROPOSAL



DO:

READ the entire RFP and carefully follow instructions.

ASK questions during the specified Q&A period (including any requests for changes to the Ts and Cs, specifications, cost and billing structure, etc.)

DON'T:

ASSUME you know the requirements– every RFP is unique.

ASK the State to accept different Ts and Cs or other requirements/limitations in your proposal (or after a contract is issued). * **Modifications & Exceptions**

TO HAVE YOUR PROPOSAL CONSIDERED

DO:

RESPOND to all (M) and (ME) sections; be sure to clearly state how you meet all minimum/mandatory requirements; include signed **Signature Page** and any other separate attachments.

SUBMIT on time.

DON'T:

FORGET any of the mandatory sections– these usually cannot be submitted after the RFP closes.

WAIT until the last minute.

TO HAVE YOUR PROPOSAL CONSIDERED

DO:

FOLLOW the outline of the RFP (including subsections).

RESPOND to the actual sections of the RFP → use the terminology from the RFP and carefully tailor your response.

DON'T:

PROVIDE your response in one long narrative → evaluators may miss something or not realize that a proposed solution refers to a particular RFP section

COPY/PASTE material from other RFP responses or sales materials without tailoring to the RFP.

TO EARN HIGHER SCORES

DO:

DEMONSTRATE your understanding of the agency need.

EXPLAIN your solution in detail

DON'T:

RELY solely on your qualifications/experience—must show how you will help the agency meet its goals.

EXPECT the evaluators to infer or “connect the dots.”

TO EARN HIGHER SCORES

DO:

DETAIL in your proposal how you will meet the requirements and provide excellent service.

DISCUSS any innovative or unique processes (but make sure to demonstrate that these are tested and successful processes).

DON'T:

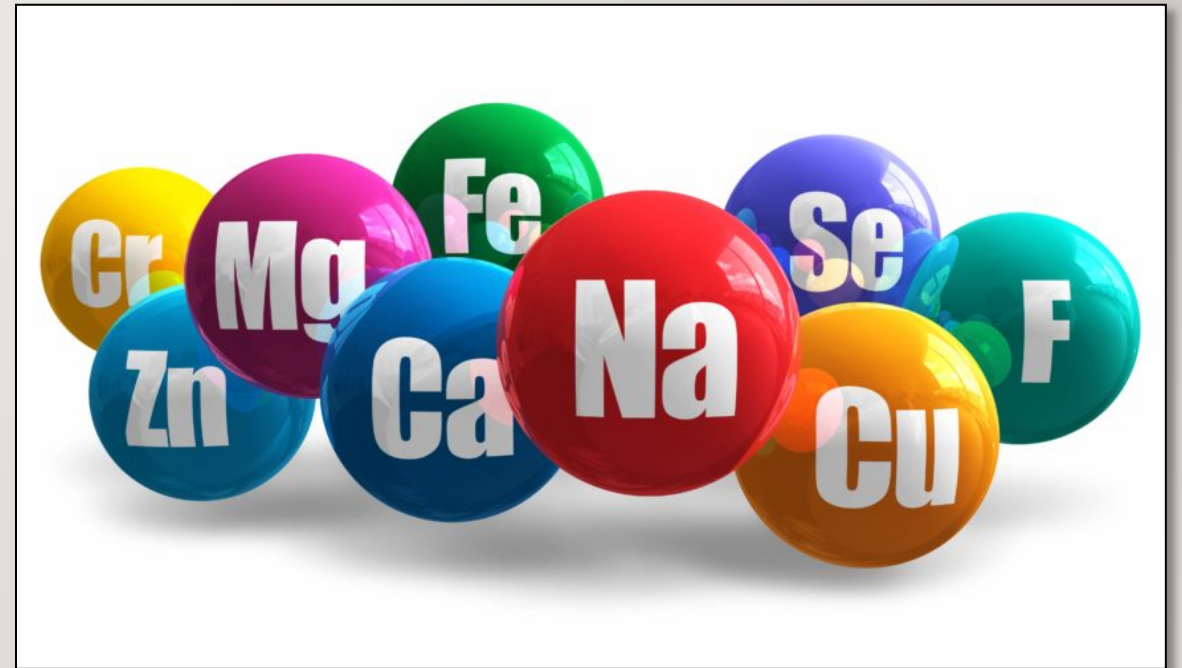
RELY on evaluators' "outside" knowledge of you or your solution → they can only evaluate on the "4 corners" of the proposal.

FORGET to identify trade secret information and submit a redacted copy of the proposal and list of trade secrets (with justifications).

TO EARN HIGHER SCORES

HOW ELEMENTS OF RFP APPEAR IN IPRO

- Header
- Description
- Prerequisites
- Buyer Attachments
- Supplier Attachments
- Questions
- Items



HEADER

Setup

| | |
|----------------|------------------------------|
| Event Title * | Auditing Services |
| Event Type ? | Request for Proposal |
| Work Group | Idaho Division of Purchasing |
| Event Number * | RFP20210593 |

▼ Sourcing Additional Information

Total Estimated Value * ? 3,500,000

▼ NIGP Codes

| | |
|---|-----------------------------------|
| Reporting NIGP Code (Mandatory Field) | 946-20 - Auditing |
| Additional NIGP Codes | 2 Values Selected |
| Item NIGP Codes | 918-04 - Accounting/Auditing... |
| Forced Supplier Invitation by NIGP Code | Yes |

▼ Payment

| | |
|-----------------|--------------|
| Currency | US Dollar |
| Estimated Value | - |
| Payment Terms | 0% 0, Net 30 |

▼ Bid and Evaluation

| | |
|---|-----|
| Sealed Bids (Mandatory for RFPs & ITBs) ? | Yes |
| Respond by Proxy | Yes |
| Use Panel Questionnaire | No |
| Auto Score | No |
| Cost Analysis | No |
| Alternate Items | No |
| Allow Split Item Quantity in Evaluations | No |
| Enforce Minimum Price | No |

HEADER

▼ Display and Communication

| | |
|--------------------------------|---|
| Visible to Public | Yes |
| Public Event Short Description | Financial Statement and Federal Uniform Guidance Services |
| Restrict Buyer Notifications | No |

▼ Dates

| | |
|---|--|
| Time Zone | MDT/MST - Mountain Standard Time (US/Mountain) |
| Open Date ★ | 8/28/2020 8:30:00 AM |
| Close Date (Close date and time must be within agency business hours) ★ | 10/26/2020 5:00:00 PM |
| Sealed Bid Open Date ★ | 10/27/2020 10:30:00 AM |
| Show Sealed Bid Open Date to Supplier | ✓ Show Sealed Bid Open Date to Supplier |
| Q&A Submission Close Date ★ | ✓ Same as Close Date |

HEADER

Description

Event Actions History ?

The Division of Purchasing (DOP), on behalf of the Office of the State Board of Education, is seeking proposals from qualified vendors to provide Financial Statement and Federal Uniform Guidance Services.

NOTE: THE FULL SOURCING EVENT IS ONLY AVAILABLE BY LOGGING INTO IPRO AT <https://solutions.scquest.com/apps/Router/SupplierLogin?CustOrg=StateofIdaho>. SUPPLIERS THAT ONLY VIEW THE DOCUMENTS AVAILABLE FROM THE PUBLIC WEBSITE, AND DO NOT LOGIN TO IPRO, MAY NOT HAVE ACCESS TO ALL DOCUMENTS (INCLUDING ATTACHMENTS, Q AND A, AND MORE). IT IS THE SUPPLIER'S SOLE RESPONSIBILITY TO ENSURE ACCESS TO THE FULL SOURCING EVENT BY LOGGING INTO IPRO; THE STATE WILL NOT BE RESPONSIBLE FOR A SUPPLIER'S INABILITY TO ACCESS INFORMATION THAT IS AVAILABLE BY LOGGING IN.

PREREQUISITES

| Instructions to supplier | Prerequisite Content | |
|---|--|-----------|
| Please download and acknowledge receipt of the attached Solicitation Instructions to Vendors. ★ | ↓ Solicitation Instructions Jan 2017 RFP+Administration.docx (version 2) | Actions ▼ |
| Please download and acknowledge receipt of the RFP Administration documentation. ★ | ↓ RFP Administration RFP+Administration.docx (version 3) | Actions ▼ |
| Please download and acknowledge receipt of the attached State of Idaho Standard Contract Terms and Conditions. ★ | ↓ Standard Terms and Conditions Jan 2017 Standard Terms and Conditions Jan 2017.pdf | Actions ▼ |
| Please download and acknowledge receipt of the attached Insurance Requirements. Note: Suppliers that do not currently hold the type/level of insurance required are strongly encouraged to contact an insurance representative to obtain a quote prior to submitting a proposal. An awarded contractor's inability to obtain the required insurance may be grounds for termination of the contract for cause and may affect the evaluation of that supplier's responsibility on future sourcing events. ★ | ↓ Insurance Requirements Insurance+Requirements.docx (version 4) | Actions ▼ |
| Download and fill out the Cover Form in it's entirety. Upload Cover Form when completed to the Suppliers Attachment section of this Sourcing Event ★ | ↓ COVER FORM ATTACHMENT+4+COVER+FORM.docx (version 2) | Actions ▼ |
| Download the attached Signature Page, complete and sign, and upload completed form under Supplier Attachments. ★ | ↓ Signature Page Signature Page ITB RFP.pdf | Actions ▼ |
| Please download and acknowledge receipt of the attached Special Terms and Conditions. | ↓ Special Terms and Conditions SPECIAL+TERMS+&+CONDITIONS.doc | Actions ▼ |

BUYER ATTACHMENTS

| Buyer Attachments | | | | | Event Actions ▼ | History | ? |
|---|-----------|--------|----------------|-----------------------|-----------------|---------|---|
| 1-9 of 9 Results | | | | | 10 Per Page ▼ | | |
| Attachment ▲ | Version ▲ | Size ▲ | Added By ▲ | Modified Date ▲ | | | |
| ↓ ATTACHMENT 1 PRE-PROPOSAL CONFERENCE REGISTRATION FORM ATTACHMENT+1+PRE-PROP+CON+REG+FORM.docx | 2 | 16 KB | Jason Urquhart | 8/28/2020 8:03:27 AM | Actions ▼ | | |
| ↓ ATTACHMENT 2 OFFEROR QUESTIONS ATTACHMENT+2+OFFEROR+QUESTIONS.docx | 2 | 17 KB | Jason Urquhart | 8/28/2020 8:03:55 AM | Actions ▼ | | |
| ↓ ATTACHMENT 3 MODIFICATION AND EXCEPTION FORM ATTACHMENT+3+MOD+&+EXCEPTION+FORM.docx | 2 | 16 KB | Jason Urquhart | 8/28/2020 8:04:07 AM | Actions ▼ | | |
| ↓ APPENDIX A IDAHO TERMS AND CONDITIONS BACKGROUND AND LIMITATIONS APPENDIX A IDAHO TERMS AND CONDITIONS BACKGROUND AND LIMITATIONS.docx | 1 | 17 KB | Karen Butler | 7/10/2020 12:44:48 PM | Actions ▼ | | |

SUPPLIER ATTACHMENTS

Supplier Attachments

[History](#) | [?](#)

For this event suppliers will be able to upload attachments with their bid response.

QUESTIONS

Questions

Event Actions | History | ?

On This Page

Export Questions

★ Response is Required

- Group 1: Business Information (2)
- Group 2: Organization & Staffing (3)
- Group 3: Scope of Work (2)
- Group 4: Cost Proposal (1)
- Group 5: Amendments (2)

Group 1: Business Information

| # | Question Text | Conditional Upon | Response Type | |
|-----|--|------------------|-------------------|----------------------|
| 1.1 | (ME) Experience - Describe in detail your knowledge and experience in providing governmental auditing services similar to those required in this RFP, particularly related to higher education financial and taxation technical issues. Include Offerors business history, description of current service area, and customer base. ★ | - | Text (Multi-Line) | View |

QUESTIONS

| 1.2 | (E) Customer Retention - Over the last ten (10) years, approximately what percentage of customers have chosen to remain with your company when given an option (e.g. exercising optional renewals, extending agreements, selecting your company again upon re-solicitation, etc.) ★ | - | Numeric Text Box | View |
|---|---|------------------|-------------------|----------------------|
| Group 2: Organization & Staffing | | | | |
| # | Question Text | Conditional Upon | Response Type | |
| 2.1 | (ME) Lead Partner(s) (see section 1.2.2 in the Scope of Work) - Identify the person(s) who will be the dedicated Lead Partner(s) if Offeror is awarded a contract. Provide a description of the proposed Lead Partner's experience and qualifications (or upload a resume in response to Question 2.2). ★ | - | Text (Multi-Line) | View |
| 2.2 | You may submit a resume in response to the question above. | - | File Upload | View |
| 2.3 | (ME) Key Personnel and Qualifications - Provide resumes for employees who will be managing, directly providing services, or both, under the Contract (with the exception of the Lead Partner(s), which is covered in sections 2.1 and 2.2 above). For positions that are not filled, a position description (including requisite qualifications/experience) should be provided. Resumes shall include education, experience, license, and/or certifications of each individual. ★ | - | Text (Multi-Line) | View |

QUESTIONS

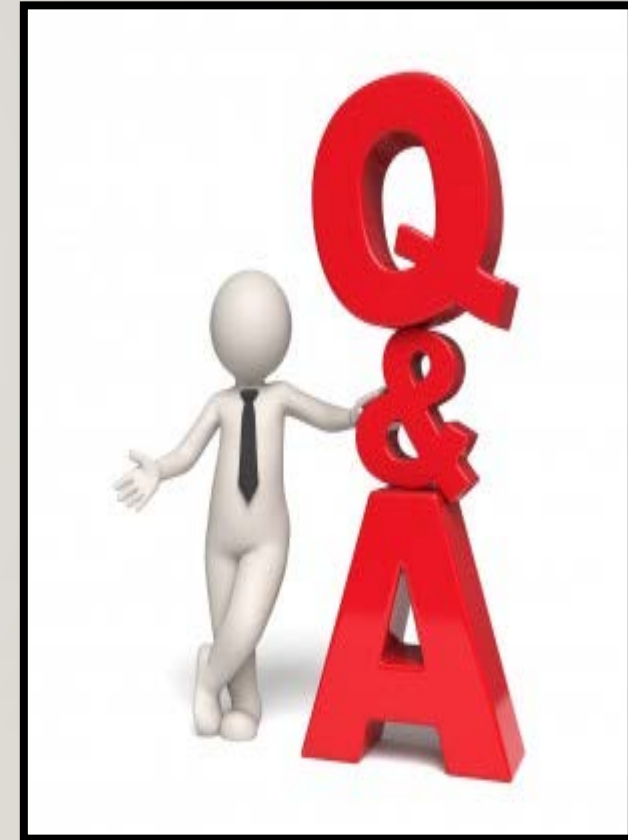
| ▼ Group 3: Scope of Work | | | | |
|--------------------------|--|--|--------------------------|----------------------|
| # | Question Text | Conditional Upon | Response Type | |
| 3.1 | Download the attached Scope of Work and indicate your understanding and willingness to comply. ★ | - | Dropdown List (Pick One) | View |
| 3.2 | Offer must upload the completed scope of work ★ | Download the attached Scope of Work and indicate your understanding and willingness to comply. | File Upload | View |
| ▼ Group 4: Cost Proposal | | | | |
| # | Question Text | Conditional Upon | Response Type | |
| 4.1 | Download, complete (five tabs) and upload the attached Attachment 5 - Cost Proposal (MAKE SURE THAT YOU ENTER YOUR COST IN THE ITEMS SECTION OF IPRO AS \$0.00.) ★ | - | File Upload | View |
| ▼ Group 5: Amendments | | | | |
| # | Question Text | Conditional Upon | Response Type | |
| 5.1 | Please download and acknowledge receipt of the attached Amendment 1. (State "Acknowledged" in your response to this Question.) ★ | - | Text (Single Line) | View |
| 5.2 | Please download and acknowledge receipt of the attached Amendment 2. (State "Acknowledged" in your response to this Question.) ★ | - | Text (Single Line) | View |

PRE-PROPOSAL CONFERENCE

- ~ 10 Days after RFP is posted
- Often Virtual (especially now)
- Opportunity to meet DOP and Agency Representatives
- Highlighted Areas of RFP
- Background Info
- Time for Oral Q&A

WRITTEN QUESTIONS AND ANSWERS

- Submit questions for clarifications, requests for changes and requests for information
- Please do NOT submit in pdf
- Turn around time ~ 3 days, depending on variables



RFP CLOSING (PROPOSALS DUE)

- 10 Business Days after last changes made in RFP
- Submission currently only available in IPRO

OPENING OF PROPOSALS

- Currently NO Public Openings
- Names of Offerors is the only thing read (if opened publicly)
- Offeror names are public information once proposals are opened



EVALUATIONS

- Initial Review of Proposals
- Team of 3-5 Evaluators
- Oral Presentations or Product Demonstrations
- Cost information is Evaluated in Excel.doc

OTHER PRE-AWARD ACTIVITIES

- Modifications and Exceptions
- Best and Final Offers – sometimes held
- Responsibility Check
- Letters of Intent to Award
- 5 Day Appeal Period
- Non-Responsive Letters are possible
- System of Award Management Check (Sam.gov)

AWARD

- Contract Purchase Order
- Blanket Purchase Order
- Statewide Blanket Purchase Order



PROOF OF INSURANCE

- Usually required within 5 Business Days after Award

QUESTIONS?
