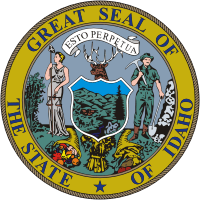
# 



**STATE OF IDAHO**

**If RFP is being released by DOP enter DIVISION OF PURCHASING FOR THE DEPARTMENT OF** **AGENCY NAME; otherwise enter THE DEPARTMENT OF** **AGENCY NAME**

**REQUEST FOR PROPOSAL (RFP)**

**RFP TITLE**

**RFP Number**

Issue Date Enter Date of Release

*[Right click on table of contents and “update field” and “entire table” when RFP is complete.]*

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# RFP Administrative Information

|  |  |
| --- | --- |
| RFP Title: | Title |
| RFP Project Description: | Short Description of Project |
| RFP Lead: | Name, Title  Agency  Address  E-mail  Phone |
| Submit sealed Proposal (if submitting manually):  MANUAL PROPOSALS MUST BE RECEIVED AT THE PHYSICAL ADDRESS DESIGNATED FOR COURIER SERVICE AND TIME/DATE STAMPED BY DOP [REPLACE WITH AGENCY NAME IF AGENCY IS RELEASING RFP] PRIOR TO THE CLOSING DATE AND TIME.  Submit electronically via IPRO (*if permitted by the terms of the RFP*): | Address for Courier  Enter Address for Courier  Address for US Mail (if different)  Address for Mail  Electronic Submission  [IPRO LOGIN](http://purchasing.idaho.gov/information-for-vendors/ipro-epurchasing-system/ipro-login/) |
| Pre-Proposal Conference:  Pre-Proposal Conference Location: | Day of week, date, time Mountain Time  Address/Room # (include any additional information if agency has security desk) |
| Deadline To Receive Questions: | Day of week, date, 11:59:59 p.m. Mountain Time |
| RFP Closing Date: | *See* IPRO Header Document |
| RFP Opening Date: | 10:30 a.m. Mountain Time the following business day after closing |
| Oral Presentations (if they will be conducted otherwise remove) | Tentatively scheduled for the week of Enter Date |
| Initial Term of Contract and Renewals: | Spell out the number (#) years. Upon mutual, written agreement, the Contract may be renewed, extended or amended. The anticipated total Contract term is Spell out number of years (#) years. |

# OVERVIEW

## Purpose

Brief Statement of Purpose of RFP

## Background Information

(Insert Background Information here. Any RFP-specific defined terms should be included on **Attachment 4, Definitions.**)

For Marketing/Media Purchases (or other projects that may involve printing by the Contractor) add:

The resulting contract is subject to the provisions of Idaho Code Title 60 chapter 1. Except as provided in this paragraph, the Contractor shall ensure all printing, binding, engraving, and stationary work is executed within the state of Idaho. The Contractor may execute such work outside the state of Idaho if any of the exemptions in Idaho Code §60-103 apply.

## Pre-Proposal Conference

A non-mandatory pre-proposal conference will be held at the location and time as indicated in **Section** **1**, page 1 of this RFP. This will be your opportunity to ask questions, in person, with the Agency Name (Acronym) staff. All parties interested are invited to participate either by attending the conference or by an established call in number. **Those choosing to participate must pre-register to receive phone conferencing and meeting details by submitting the completed Pre-Proposal Conference Registration Form (Attachment 3) via email to the RFP Lead. Parties interested are asked to register by** **date.** Any oral answers given by the State during the pre-proposal conference are unofficial, and will not be binding on the State. Conference attendance is at the participant’s own expense. (*If space or phone ports are limited, add language such as: “limited to three (3) representatives from each vendor, as space is limited”*)

## Questions

2.4.1 This Solicitation is issued by the State via the State’s e-Procurement system, IPRO ([IPRO LOGIN](http://purchasing.idaho.gov/information-for-vendors/ipro-epurchasing-system/ipro-login/)).

The RFP Lead is the only contact for this Solicitation. (Remove the highlighted sentence if Solicitation is issued by the agency). All correspondence must be in writing. In the event that it becomes necessary to revise any part of this RFP, addenda will be posted at IPRO. It is the responsibility of parties interested in this RFP to monitor IPRO for any updates or amendments. Any oral interpretations or clarifications of this RFP must not be relied upon. All changes to this RFP will be in writing and must be posted to IPRO to be valid. Alternate Proposals are not allowed.

2.4.2 Questions or other correspondence must be submitted in writing to the RFP Lead listed below.

**QUESTIONS MUST BE RECEIVED BY 11:59:59 P.M. MOUNTAIN TIME ON THE DATE LISTED IN THE RFP ADMINISTRATIVE INFORMATION.**

Contact Name, Contact Title

Agency

Address

City, State Zip Code

Fax:

E-mail:

2.4.3 **Written questions must be submitted using Attachment 1,** Offeror Questions. Official answers to all written questions will be posted on IPRO as an amendment to this RFP.

2.4.4 Any questions regarding the State of Idaho Standard Contract Terms and Conditions, found at ["Contract Terms and Conditions"](http://purchasing.idaho.gov/wp-content/uploads/Terms_Conditions/Standard%20Terms%20and%20Conditions%20Jan%202017.pdf), must also be submitted in writing, using **Attachment 1,** Offeror Questions, by the deadline identified in the RFP Administrative Information. The State will not consider proposed modifications to these requirements after the date and time set for receiving questions. Questions regarding these requirements must contain the following:

1. The rationale for the specific requirement being unacceptable to the party submitting the question (define the deficiency).
2. Recommended verbiage for the State’s consideration that is consistent in content, context, and form with the State’s requirement that is being questioned.
3. Explanation of how the State’s acceptance of the recommended verbiage is fair and equitable to both the State and to the party submitting the question.

2.4.5 **Proposals which condition the Proposal based upon the State accepting other terms and conditions not found in the RFP, or which take exception to the State’s terms and conditions, will be found non-responsive, and no further consideration of the Proposal will be given.**

# INSTRUCTIONS FOR SUBMISSION OF PROPOSAL

*(For Sections 3.1 and 3.2, if electronic submission is not allowed, delete Section 3.1 and renumber the remainder of the section, then delete this sentence.*)

## Submission of Proposals

Proposals may be submitted manually or electronically.

If your Proposal contains trade secret information which you have identified, you must also submit a redacted copy of the Technical Proposal (in electronic format, with the word “redacted” in the file name) with all trade secret information removed or blacked out; as well as a separate document containing a complete list (per the instructions in Section 5.3, below) of all trade secret information which was removed or blacked out in the redacted copy.

3.1.1 Electronically Submitted Proposals

Electronically submitted Proposals must be submitted through IPRO ([IPRO LOGIN](http://purchasing.idaho.gov/information-for-vendors/ipro-epurchasing-system/ipro-login/)) When submitting through IPRO, enter your “Total Cost” in IPRO as “$0,” and UPLOAD YOUR TECHNICAL PROPOSAL, COST PROPOSAL, AND ALL OTHER REQUIRED SUBMITTAL ITEMS. The Technical Proposal consists of Section 5 Mandatory Submission Requirements; Section 6 Business Information; Section 7 Organization and Staffing; and Section 8 Scope of Work.

If submitting via IPRO, be advised that the Offeror for Proposal evaluation and award purposes is the entity profile under which the Proposal is submitted in IPRO, which must be the same legal entity presented in the uploaded response materials. If the entity identified on the state supplied Signature Page differs from the entity under which you submit your Proposal in IPRO, the information provided on the Signature Page prevails.

While it is not mandatory to submit your Proposal electronically via IPRO, all Offerors participating in a Solicitation issued through IPRO must establish an account in the IPRO system (even if submitting a Proposal manually outside of IPRO) as it is necessary in order to process and/or award the resulting Contract(s). Establishing an account is free and only takes a few minutes.

Offerors are further advised to upload response materials with descriptive file names, organized and consolidated in a manner which allows evaluators to efficiently navigate the Offeror’s response; as the State will print uploaded documents for evaluation in the manner received via IPRO.

3.1.2 Manually Submitted Proposals

The Proposal must be addressed to the RFP Lead, sealed, and identified as “**RFP Number,** **RFP Title**.” Include your company name on the outside of the package.

The Technical Proposal and separately sealed Cost Proposal must be submitted at the same time (place all Proposal response materials within a larger package).

Each Proposal must be submitted in one (1) original with Number of Copies (#) copies of the Technical Proposal and one (1) original and one (1) copy of the Cost Proposal.

Offerors submitting manually must also submit one (1) electronic copy of the entire Proposal on CD or USB device. Word or Excel format is required (the only exception is for financials, brochures or other information only available in an alternate format). The format and content must be the same as the manually submitted Proposal. The electronic version must NOT be password protected or locked in any way.

The Technical Proposal must be separately sealed, identified “**Technical Proposal –** **RFP Number** **RFP Title**.”

The Cost Proposal must be separately sealed, identified as “**Cost Proposal –** **RFP Number** **RFP Title**.”

**3.2 (M) Signature Page**

All Proposals must be submitted with a state supplied Signature Page, located on the IPRO header page as an attachment. For electronically submitted Proposals, submit a completed, scanned signature page. For manually submitted Proposals, the signature page must contain an **ORIGINAL HANDWRITTEN** signature executed in **INK** OR **AN ELECTRONIC SIGNATURE**, and be returned with the relevant Solicitation documents. **PHOTOCOPIED SIGNATURES** or **FACSIMILE SIGNATURES** are **NOT ACCEPTABLE for manually submitted Proposals (and will result in a finding that your Proposal is non-responsive).** Your ORIGINAL Signature Page should be included at the FRONT of your ORIGINAL Technical Proposal.

# PROPOSAL FORMAT

These instructions describe the format to be used when submitting a Proposal. The format is designed to ensure a complete submission of information necessary for an equitable analysis and evaluation of submitted Proposals. There is no intent to limit the content of Proposals.

## Evaluation Codes

**(M)** Mandatory Specification or Requirement - failure to comply with any mandatory specification or requirement will render Offeror’s Proposal non-responsive and no further evaluation will occur.

**(ME)** Mandatory and Evaluated Specification - failure to comply will render Offeror’s Proposal non-responsive and no further evaluation will occur. Offeror is required to respond to this specification with a detailed response identifying its understanding and how it will comply. Points will be awarded based on predetermined criteria.

**(E)** Evaluated Specification - a response is desired and will be evaluated and scored. If not available, respond with “Not Available” or other response that identifies Offeror’s ability or inability to supply the item or service or meet the specification. Failure to respond will result in zero (0) points awarded for the specification. If available, Offeror is to respond to this specification with a detailed response identifying its understanding and how it will comply, and points will be awarded based on predetermined criteria.

***Note: Offerors are directed to IDAPA 38.05.01.074.03.a, as well as IDAPA 38.05.01.091.05, which allow the designated State official to waive minor informalities as well as minor deviations.*** ***The State also reserves the right to seek clarification on any M, ME or E requirement.***

## Table of Contents

Include a table of contents in the Technical Proposal identifying the contents of each section, including page numbers of major Sections.

## Format

Proposals shall follow the numerical order of this RFP starting at the beginning and continuing through the end of the RFP. Proposal sections and Sections must be identified with the corresponding numbers and headings used in this RFP. In your response, restate the RFP section and/or Section, followed with your response.

Offerors are encouraged to use a different color font, bold text, italics, or other indicator to clearly distinguish the RFP section or Section from the Offeror’s response.

# Mandatory Submission Requirements

## (M) Cover Letter

The Technical Proposal must include a cover letter on official letterhead of the Offeror; with the Offeror’s name, mailing address, telephone number, facsimile number, e-mail address, and name of Offeror’s authorized signer. The cover letter must identify the RFP Title and number, and must be signed by an individual authorized to commit the Offeror to the work proposed. In addition, the cover letter must include:

5.1.1 Identification of the Offeror’s corporate or other legal entity status. Offerors must include their tax identification number. The Offeror must be a legal entity with the legal right to contract.

5.1.2 A statement indicating the Offeror’s acceptance of and willingness to comply with the requirements of the RFP and attachments, including but not limited to the [State of Idaho Standard Contract Terms and Conditions](http://purchasing.idaho.gov/wp-content/uploads/Terms_Conditions/Standard%20Terms%20and%20Conditions%20Jan%202017.pdf) and any Special Terms and Conditions included in **Appendix D**. *Remove if there are no Special Terms and Conditions*.

5.1.3. A statement of the Offeror’s compliance with affirmative action and equal employment regulations.

5.1.4 A statement that Offeror has not employed any company or person other than a bona fide employee working solely for the Offeror or a company regularly employed as its marketing agent, to solicit or secure the Contract, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Contractor or a company regularly employed by the Contractor as its marketing agent, any fee, commission, percentage, brokerage fee, gifts or any other consideration contingent upon or resulting from the award of the Contract. The Offeror must affirm its understanding and agreement that for breach or violation of this term, the State has the right to annul the Contract without liability or, in its discretion, to deduct from the Contract price the amount of any such fee, commission, percentage, brokerage fee, gifts or contingencies.

5.1.5 A statement naming the firms and/or staff responsible for writing the Proposal.

5.1.6 A statement that Offeror is not currently suspended, debarred or otherwise excluded from federal or state procurement and non-procurement programs. Vendor information is available on the Internet at: <https://sam.gov>.

5.1.7 A statement affirming the Proposal will be firm and binding for ninety (90) calendar days from the Proposal opening date. (Ninety (90) calendar days is minimum time, increase if needed. Remove the language in parenthesis prior to posting.)

5.1.8 A statement that the Offeror warrants that it does not knowingly and willfully employ persons who cannot legally work in this country; it takes steps to verify that it does not hire persons who have entered our nation illegally or cannot legally work in the United States; and that any misrepresentation in this regard or any employment of persons who have entered our nation illegally or cannot legally work in the United States constitutes a material breach and will be cause for the imposition of monetary penalties up to five percent (5%) of the Contract price, per violation, and/or termination of its Contract.

## (M) Acknowledgement of Amendments

If the RFP is amended, the Offeror must acknowledge each amendment with a signature on the acknowledgement form provided with each amendment. Failure to return a signed copy of each amendment acknowledgement form with the Proposal may result in the Proposal being found non-responsive. IDAPA 38.05.01.52

## Trade Secrets

Paragraph 28 of the Solicitation Instructions to Vendors describes trade secrets to “*include a formula, pattern, compilation, program, computer program, device, method, technique or process that derives economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by other persons and is subject to the efforts that are reasonable under the circumstances to maintain its secrecy*.” In addition to marking each page of the document with a trade secret notation (as applicable; and as provided in Paragraph 28 of the Solicitation Instructions to Vendors), Offerors must also:

Identify with particularity the precise text, illustration, or other information contained within each page marked “trade secret” (it is not sufficient to simply mark the entire page). The specific information you deem “trade secret” within each noted page must be highlighted, italicized, identified by asterisks, contained within a text border, or otherwise clearly delineated from other text/information and specifically identified as a “trade secret.”

Provide a separate document entitled “List of Redacted Trade Secret Information” which provides a succinct list of all trade secret information noted in your Proposal; listed in the order it appears in your submittal documents, identified by Page #, Section #/Paragraph #, Title of Section/Paragraph, specific portions of text/illustrations; or in a manner otherwise sufficient to allow the State’s procurement personnel to determine the precise text/material subject to the notation. Additionally, this list must identify with each notation the specific basis for your position that the material be treated as exempt from disclosure and how the exempting the material complies with the Public Records Law.

## Executive Summary

Include an executive summary in the Technical Proposal providing a condensed overview of the contents of the Technical Proposal demonstrating an understanding of the services to be performed.

# Business Information

*Tailor these sections to your project; adding and modifying as appropriate*

## (ME) Experience

Describe in detail your knowledge and experience in providing services similar to those required in this RFP. Include Offeror’s business history, description of current service area, and customer base. Customize this section as needed for your project.

## (E) References

Provide three (3) completed Reference Questionnaires. ***See* Attachment 2**.

*As a general rule, DOP recommends financials be included for Contracts in excess of $1M or for which the Contractor will be required to make a significant up-front investment – or as the State/agency otherwise determine to be necessary or advisable in the evaluation of Offerors.*

## (M) Financials (remove this section if financials not required)

Offerors are required to provide a D&B Comprehensive Insight Plus credit report or Experian ProfilePlus report (Credit Report), indicating the Offeror’s current credit score, with the Proposal submission. The Offeror should stamp or write “Trade Secret” or “Confidential” on each page of the Credit Report information that it does not want released. The information will be held in confidence to the extent that law allows. Credit Report must be current and have been established within thirty (30) calendar days of the Proposal closing date.

Credit Reports must be for the exact organization submitting the Proposal as identified on the state supplied signature page. The Credit Report cannot be combined or consolidated with the information from any entity other than the company submitting the Proposal. If the Offeror’s name on the Proposal does not match the name on the Credit Report, it will not be accepted and the Offeror will be found non-responsive.

The (M) Mandatory elements of this section are two-fold: the Offeror must provide a credit score on one of the named reports AND the report provided in response to the RFP must demonstrate a Delinquency Predictor rating of 1 – 3 or a CRS (credit ranking score) rating of 26 – 100.

Failure to provide one of the named reports (or failure to provide one of the designated credit scores) will result in a finding that the Offeror is non-responsive.

In addition:

**A company receiving a Delinquency Predictor rating of High risk (5) or High Medium risk (4) of experiencing financial stress and delinquent payments will not be considered for Contract award.**

Delinquency Predictor of 1 - Low Risk

Delinquency Predictor of 2 - Low Medium Risk

Delinquency Predictor of 3 - Medium Risk

Delinquency Predictor of 4 - High Medium Risk

Delinquency Predictor of 5 - High Risk

**A company receiving a rating of High risk (0-10) or High Medium risk (11-25) of experiencing financial stress and delinquent payments will not be considered for Contract award.**

CRS of 76-100 = Low Risk

CRS of 51-75 = Low Medium Risk

CRS of 26-50 = Medium Risk

CRS of 11-25 = High Medium Risk

CRS of 0-10 = High Risk

# Organization and Staffing

Describe your qualifications to successfully complete the requirements of the RFP by providing a detailed response to the following:

*Tailor these sections to your project needs; adding and modifying as appropriate*

## (ME) Key Personnel and Qualifications

Provide a list of key management, customer service and other personnel to be used in the fulfillment of this Contract, to include all pertinent contact information. Provide resumes for employees who will be managing and/or directly providing services under the Contract. For positions that are not filled, a position description (including requisite qualifications/experience) must be provided.

## (M) Subcontractors

If you intend to utilize subcontractors, describe the extent to which they will be used to comply with Contract requirements. Include each position providing service, and provide a detailed description of how the subcontractors are anticipated to be involved under the Contract. Include a description of how the Offeror will ensure that all subcontractors and their employees will meet all Scope of Work requirements.

If your project may involve extensive use of subs and subs will be named in the Proposal response; you may consider revising this section to include an evaluation of subcontractor qualifications as part of your evaluated criteria; e.g. “Subcontractors will be required to provide the same qualification, resume, and reference information as Offerors. Offerors must disclose the location of the subcontractor’s business office and the location(s) of where the actual work will be performed.” If you do so, you will need to designate this section as evaluated.

[Other agency/project-specific requested information related to organization and staffing]

# SCOPE OF WORK

## (ME) Requirements

Use this Proposal outline as part of your response to the RFP. Keep in mind, the evaluators will be scoring your Proposal based on the methodologies proposed and the completeness of the response to each item listed below.

Describe how you will meet each requirement listed below (e.g. personnel, proposed time lines, methodologies to be used, etc.):

8.1.1 Describe how you will

8.1.2 Describe how you will

8.1.3 Describe how you will

# COST PROPOSAL AND BILLING PROCEDURE

## (ME) Cost Proposal

Use the format established in **Appendix A** to respond to the Cost Proposal of this RFP, and identify it as “**Appendix A** - Cost Proposal – RFP Number RFP Title.” Altering the format may result in a finding that your Proposal is non-responsive.

The Offeror must provide a fully-burdened rate which must include, **but not be limited to**, all operating and personnel expenses, such as: overhead, salaries, administrative expenses, profit, and supplies. Include other items as appropriate, with regard to local/non-local travel, per diem, etc.

Add any agency/project specific requirements/limitations/conditions; address unit costs, etc.

## Billing Procedure

*[Modify as appropriate for your agency needs;* *add agency-specific requirements as appropriate: e.g. Invoices and reports must be submitted to the (Department/Agency) no later than # days after #; Invoices received without the required report(s)/documentation will be returned to the Contractor for resubmission with the required report(s)/documentation; etc. Remove this language before posting*]

The Contractor must provide a signed invoice upon [Agency acceptance/delivery/service completion/completion of each line item/etc.]. The invoice [and respective reports] must be submitted no later thirty (30) calendar days after [acceptance/delivery/services were provided]. No invoice will be accepted or paid without receipt of required [reports/documentation/etc.]. Invoices submitted without the required [reports/documentation] will be returned to the Contractor for resubmission.

The Contractor must provide the following information with each invoice:

1 IPRO contract number (and name of project/product, if appropriate); and agency purchase order number, if applicable.

2 Identification of the billing period.

3 Total amount billed for the billing period.

4 Detailed description of services/products provided and associated # of hours/$ amounts, as appropriate.

5 Name of authorized individual/contact information for Contractor.

Invoices and reports must be submitted to:

Name

Agency name

Address

[*Add agency-specific requirements as appropriate: e.g. Final invoices and reports must be submitted to the (Department/Agency) no later than # days after #; Invoices received without the required report(s)/documentation will be returned to the contractor for resubmission with the final report(s)/documentation; etc. Remove this language before posting*]

# PROPOSAL REVIEW, EVALUATION AND AWARD

The objective of the State in soliciting and evaluating Proposals is to ensure the selection of a firm or individual that will produce the best possible results for the funds expended.

**10.1** All Proposals will be reviewed first to ensure that they meet the Mandatory Submission Requirements of the RFP as addressed in **Sections noted with an (M) or (ME)**. Any Proposal (s) not meeting the Mandatory Submission Requirements may be found non-responsive.

**10.2** The Technical Proposal will be reviewed first on a “pass” or “fail” basis to determine compliance with those requirements listed in the RFP with an **(M) or (ME)**. All Proposals which are determined by the State, in its sole discretion, to be responsive in this regard will continue in the evaluation process outlined in this Section.

**10.3** The Technical Proposal will be evaluated and scored utilizing one (1) or more Technical Proposal Evaluation Committee(s).

**10.4** The scores for the Technical Proposal will be normalized as follows: The Technical Proposal with the highest raw technical score will receive all available Technical Points 000. Other Proposals will be assigned a portion of the maximum available Technical Points, using the formula: 000 X raw score of technical Proposal being evaluated/highest raw technical score.

[Delete 10.5 if oral presentations/demos will NOT be conducted; otherwise, select one (revise as needed) and delete the remaining options; additionally:

* Identify limiting factors, such as only conducting oral presentations/demos with the three highest scoring Offerors in the evaluation of Technical Proposals (for example); and,
* You will need to add another Section that identifies that scores for oral presentations/demos will be normalized and that shows how they will be normalized (same way that Technical Proposals are normalized); and,
* Identify whether or not a team different from the Technical Proposal evaluators will be used]

**10.5** Oral Presentations/Demonstrations

[option 1] Up to three (3) Offerors, with the highest raw scores after the evaluation of the Technical Proposal is complete, may be asked to make oral presentations.

[option 2] Demonstrations and Software verification - The State may require demonstrations from up to three (3) Offerors with the highest raw technical scores. Unless otherwise specified, demonstrations will strictly be Pass/Fail and will be used to verify through demonstration how the proposed solution meets the requirements set forth in the RFP. The State may provide demonstration scenarios in accordance with the specifications of this Solicitation.

[option 3] Offeror demonstrations of proposed property - Offeror must be prepared to confirm its ability to provide all proposed property to the State. Any required confirmation must be provided at a site approved by the State and at no cost to the State.

[option 4] Oral demonstrations, Software/Hardware verification and validation (V&V), and Customer Site Visits may be required by the State after the evaluation of the Technical Proposals.

If all responsive Proposals will have cost scored, remove this paragraph 10.6 in its entirety.

**10.6** The Cost Proposal will only be opened and evaluated for Offerors who receive define any limiting factors for opening cost Proposals, e.g. top three technical; minimum %age of available points, etc.

**10.7** The scores for the Cost Proposal will be normalized as follows: The cost evaluation will be based on describe what cost information will be used; e.g. ‘the total cost proposed for required services as itemized in Appendix A’ then remove this instruction. The Proposal with the lowest overall Total Cost proposed will receive a score of 000. Other Proposals will be assigned a portion of the maximum score using the formula: 000 X lowest cost Proposal/cost Proposal being evaluated.

**10.8** The number of total points for each Proposal will be determined by adding the normalized score for the Technical Proposal to the normalized score for the Cost Proposal.

\*Re-number Section 10 if some paragraphs not used\*

**10.9 Evaluation Criteria**

**Technical Proposal**:

Mandatory Submission Requirements Pass/Fail

Business Information (Section 6)       points

Organization and Staffing (Section 7)       points

Scope of Work (Section 8)       points

*Oral Demonstrations (if conducted) 200 points*

**Cost** **Proposal** (**Appendix A**) Usually 300 or 400 points

Total Points 1,000 points

*Total Points with Oral Demonstrations (if conducted) 1,200 points*

**10.10 Award**

Award of Contract will be made to the responsive, responsible Offeror whose Proposal receives the highest number of total normalized points.

# APPENDIX A – COST PROPOSAL

RFP Number and Title

[*Describe type of Cost structure required, e.g. based on the service industry norm. Insert line items and/or a table, as appropriate; remove this language before posting*]***:***

**This Appendix A “Cost Proposal” must be completed and returned with your response.**

Company Name: \_

Name of Individual submitting Proposal:

Phone: Fax:

E-mail:

# 

# APPENDIX B - PERFORMANCE METRICS

[Insert Performance Metrics, if applicable – suggested format, below; otherwise delete Appendix B – If no liquidated damages, delete the reference to 1.1]

[*Events of default where liquidated damages could be assessed or failure to comply could put the state agency at risk. Remove this language before posting]*

**1.1 Performance Metrics**

1. **Metric Description:**

Required Level of Expectation:      %

Method of Monitoring:

Strategy for Correcting Non-Compliance:

2. **Metric Description:**

Required Level of Expectation:      %

Method of Monitoring:

Strategy for Correcting Non-Compliance:

3. **Metric Description:**

Required Level of Expectation:      %

Method of Monitoring:

Strategy for Correcting Non-Compliance:

4. **Metric Description:**

Required Level of Expectation:      %

Method of Monitoring:

Strategy for Correcting Non-Compliance:

**1.2 Liquidated Damages**

Insert liquidated Damages Language (agencies should consult with their agency's legal counsel and with DOP; DOP can provide example LD language)

# APPENDIX C - REPORTS

[*If reports are a required element, add here; otherwise delete Appendix C.*]

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| --- | --- | --- | --- | --- | --- |
| **Report or Form** | **Required by Contract Section #** | **Description** | **Submitted to** | **Frequency** | **Date Due** |
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# APPENDIX D - SPECIAL TERMS AND CONDITIONS

*[if there are special terms and conditions, such as those that are specific to the project at hand, or to an agency, which may include: Reference to applicable State/Fed laws/regulations (e.g. HIPAA, Clean Water Act, etc.), Ownership (expanding or modifying the standard term); Software Requirements (specific to the project); additional or modified insurance requirements (e.g. Technology E/O, Professional Liability, Cyber Risk, abuse and molestation, etc.); add those here; otherwise delete Appendix E (if there are no special terms and conditions)]*

# ATTACHMENT 1 - OFFEROR QUESTIONS

PLEASE DO NOT IDENTIFY YOUR NAME OR YOUR COMPANY’S NAME OR PRODUCT NAMES OF INTELLECTUAL PROPERTY IN YOUR QUESTIONS.

ADD ROWS BY HITTING THE TAB KEY WHILE WITHIN THE TABLE AND WITHIN THE FINAL ROW.

The following instructions must be followed when submitting questions using the question format on the following page.

1. DO NOT CHANGE THE FORMAT OR FONT. Do not bold your questions or change the color of the font.
2. Enter the RFP section number that the question is for in the “RFP Section” field (column 2). If the question is a general question not related to a specific RFP section, enter “General” in column 2. If the question is in regard to a State Term and Condition or a Special Term and Condition, state the clause number in column 2. If the question is in regard to an attachment, enter the attachment identifier (example “Attachment A”) in the “RFP Section” (column 2), and the attachment page number in the “RFP page” field (column 3).
3. Do not enter text into the “Response” field (column 5). This is for the State’s use only.
4. Once completed, this form is to be e-mailed per the instructions in the RFP. The e-mail subject line is to state the RFP number followed by “Questions.”

Enter Number Enter Title

| **Question** | **RFP Section** | **RFP Page** | **Question** | **Response** |
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# ATTACHMENT 2 - (E) REFERENCES

INSTRUCTIONS TO THE OFFEROR:

Offerors will be scored on three (3) completed reference questionnaires (if fewer than three (3) are received prior to the RFP closing date and time, the Offeror will receive a zero (0) for all questions not scored and questionnaires not received). Scores from reference questionnaires will be averaged. The reference questionnaires must be from individuals, companies, or agencies for whom the Offeror provided products or services that are similar in nature and scope to those requested by this RFP, and within the last enter # years from the date this RFP was posted to IPRO. The agency name may not be utilized as a reference. Only one (1) reference will be received/qualify per reference company/agency. If multiple references are received from the same company/agency, only the first received will be accepted. Insert any other restrictions on references that may be appropriate.

References outside the requisite number of years (*See* paragraph above), and references determined by the State, in its sole discretion, to be not of a similar nature and scope to the products or services requested in this RFP will receive a score of zero (0). **Determination of similar will be made by using the information provided by the reference in Section II of the Reference Questionnaire, General Information, and any additional information provided by the reference, or otherwise obtained by the State**. It is in the State’s sole discretion as to whether or not any references will be contacted for clarification or for additional information.

**REFERENCES MUST BE RECEIVED BY THE RFP LEAD, DIRECTLY FROM THE REFERENCE, IN ORDER TO BE CONSIDERED.**

1. Offerors must complete the following information on page 2 of the “Reference’s Response To” document before sending it to the Reference for response.

a. Print the name of your reference (company/organization) on the “REFERENCE NAME” line.

b. Print the name of your company/organization on the “OFFEROR NAME” line.

c. Be certain that the RFP closing date and time in Instruction 5, on the following page, is correct.

2. Send the “Reference’s Response To” document to your references to complete.

**NOTES: It is the Offeror’s responsibility to follow up with its references to ensure timely receipt of all questionnaires. Offerors may e-mail the RFP Lead prior to the RFP closing date to verify receipt of references.**

**References are not scored by a Technical Proposal evaluation committee. References will provide scores via the reference questionnaires and the RFP Lead will enter the scores for qualifying references into a spreadsheet that will calculate averaged scores.**

**REFERENCE QUESTIONNAIRE**

**REFERENCE’S RESPONSE TO:**

**RFP Number**

**RFP Title**

**REFERENCE NAME (Company/Organization):**

**OFFEROR (Vendor) NAME (Company/Organization):** has submitted a Proposal to the State of Idaho, Agency, to provide the following services:      . We’ve chosen you as one of our references.

**INSTRUCTIONS**

1. Complete **Section I.** **RATING** using the Rating Scale provided.

2. Complete **Section II.** **GENERAL INFORMATION** (*This section is for information only and will not be scored.)*

3. Complete **Section III. ACKNOWLEDGEMENT** by manually signing and dating the document. *(Reference documents must include an actual signature.)*

4. E-mail or fax **THIS PAGE** and your completed reference document, **SECTIONS I through III** to:

RFP Lead:

Title

E-mail:

Fax: 208-

5. This completed document **MUST** be received no later than Enter Closing Date at 5:00 p.m. Mountain Time. Reference documents received after this time will not be considered. **References received without an actual signature will not be accepted**.

6. DO **NOT** return this document to the Offeror (Vendor).

7. In addition to this document, the State may contact references by phone or e-mail for further clarification, if necessary.

**Section I. RATING**

Using the Rating Scale provided below, rate the following numbered items by circling the appropriate number for each item:

**Rating Scale**

|  |  |
| --- | --- |
| **Category** | **Score** |
| Poor or Inadequate Performance | 0 |
| Below Average | 1 – 3 |
| Average | 4 – 6 |
| Above Average | 7 - 9 |
| Excellent | 10 |

*Circle* ***ONE*** *number for each of the following numbered items:*

[SAMPLE QUESTIONS PROVIDED; REVISE QUESTIONS TO FIT YOUR PROJECT THEN REMOVE THIS LANGUAGE]

1. Rate the overall quality of the vendor’s services:

**10 9 8 7 6 5 4 3 2 1 0**

2. Rate the response time of this vendor:

**10 9 8 7 6 5 4 3 2 1 0**

3. Rate how well the agreed upon, planned schedule was consistently met and deliverables provided on time. *(This pertains to delays under the control of the vendor):*

**10 9 8 7 6 5 4 3 2 1 0**

4. Rate the overall customer service and timeliness in responding to customer service inquiries, issues and resolutions:

**10 9 8 7 6 5 4 3 2 1 0**

5. Rate the knowledge of the vendor’s assigned staff and their ability to accomplish duties as contracted:

**10 9 8 7 6 5 4 3 2 1 0**

##### 6. Rate the accuracy and timeliness of the vendor’s billing and/or invoices:

**10 9 8 7 6 5 4 3 2 1 0**

7. Rate the vendor’s ability to quickly and thoroughly resolve a problem related to the services provided:

**10 9 8 7 6 5 4 3 2 1 0**

8. Rate the vendor’s flexibility in meeting business requirements:

**10 9 8 7 6 5 4 3 2 1 0**

9. Rate the likelihood of your company/organization recommending this vendor to others in the future:

**10 9 8 7 6 5 4 3 2 1 0**

**Section II. GENERAL INFORMATION**

1. Please include a brief description of the services provided by this vendor:

2. During what time period did the vendor provide these services for your business?

Month:\_\_\_\_\_\_\_\_\_ Year:\_\_\_\_\_\_\_\_\_ to Month:\_\_\_\_\_\_\_\_\_ Year:\_\_\_\_\_\_\_\_\_

**Section III. ACKNOWLEDGEMENT**

I affirm to the best of my knowledge that the information I have provided is true, correct, and factual:

Signature of Reference Date

Print Name Title

Phone Number

E-mail address

ATTACHMENT 3 - PRE-PROPOSAL CONFERENCE REGISTRATION FORM

|  |  |
| --- | --- |
| **PRE-PROPOSAL CONFERENCE** | **Date:** Day, Date, Time Mountain Time |
| **Agency:** | **RFP #:**  **Title:** |

**Verbal Information:** Questions concerning an RFP must be directed in writing to the RFP Lead in the period of time prescribed in the RFP document. Bids, Proposals, or Quotations deviating from the specifications by any means other than an authorized written addendum will be subject to rejection. The State will not be responsible for any verbal or oral information given to Vendors by anyone other than an authorized purchasing official. Reliance on any verbal representation is at the Vendor’s sole risk.

Potential Offerors choosing to participate in the Pre-Proposal Conference **must pre-register** by submitting this completed form, via e-mail, to the RFP Lead at email address. After the RFP Lead receives your form, you will be provided with phone conferencing and meeting details. Please indicate in the appropriate column if your attendance will be by phone. Attendees are askedto register for the Pre-Proposal Conferenceno later than **time, Mountain Time,** **day,** **date.**

**PLEASE PRINT:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Company** | **Email Address** | **Phone Number** | **By Phone** |
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# ATTACHMENT 4 - DEFINITIONS

Insert RFP-specific Definitions (outside of terms already defined in Code/other Attachments). Delete this Attachment 3 if not applicable.