



FLORIDA DEPARTMENT OF MANAGEMENT SERVICES

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## **The State of Florida**

### **Department of Management Services**

### **Investment Consulting and Monitoring Services for Optional Annuity and Retirement Programs**

**ITB No: DMS-17/18-050**

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Failure to file a protest within the time prescribed in section [120.57\(3\)](#), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under chapter 120, Florida Statutes. Any protest must be timely filed with the Department of Management Services' Agency Clerk listed at:  
[http://www.dms.myflorida.com/agency\\_administration/general\\_counsel](http://www.dms.myflorida.com/agency_administration/general_counsel)

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**Timeline of Events**

The table below contains the timeline of events for this solicitation, including the solicitation closing time and deadlines. It is the responsibility of the Bidder to check the [Vendor Bid System \(VBS\)](#) for any changes. The dates and times within the Timeline of Events are subject to change.

<b>Timeline of Events</b>		
<b>Events</b>	<b>Time (ET)</b>	<b>Date</b>
Solicitation posted on VBS		3/19/19
Deadline to submit questions via email to the Procurement Officer	2:00 PM	3/26/19
Department's anticipated posting of answers to submitted questions		4/9/19
Deadline to submit bid and all required documents	10:00 AM	4/16/19
Public Opening 4050 Esplanade Way, Suite 360, Tallahassee, FL 32399-0950	10:30 AM	4/16/19
Anticipated date to post Notice of Intent to Award	N/A	4/30/19
Anticipated Contract start date	N/A	7/1/19

## 1 INTRODUCTION

### 1.1 Objective

The State of Florida Department of Management Services (Department) is issuing this Invitation to Bid (ITB) to establish a contract for Investment Consulting and Monitoring Services for the Senior Management Service Optional Annuity Program (SMSOAP), and the State University Optional Retirement Program (SUSORP). The solicitation will be administered using the [Vendor Bid System](#). The Department intends to make a single award; however, the Department reserves the right to award to one or multiple Bidders, or to make no award, as determined to be in the best interest of the State.

### 1.2 Background

The Investment Consulting and Monitoring Services for SMSOAP and SUSORP have an average annual spend of \$25,000. This historical spend is for informational purposes only and should not be construed as representing actual, guaranteed, or minimum spend under a new contract.

**SUSORP:** The Department oversees administration of the SUSORP with assets of approximately \$5.6 billion as of June 30, 2018. The SUSORP serves the retirement needs for approximately 18,000 participants employed by the twelve (12) State universities in Florida and 21,500 inactive participants. The five (5) currently approved provider companies who receive ongoing contributions for the SUSORP are AXA, MetLife, TIAA, VALIC, and VOYA. Jefferson National maintains legacy investment products for SUSORP participants. Section 121.35(6)(b), Florida Statutes (F.S.), authorizes the Department to designate no more than six (6) companies as provider companies.

**SMSOAP:** The Department also oversees administration of the SMSOAP retirement plan with assets of approximately \$14.0 million as of June 30, 2018. Effective July 1, 2017, the SMSOAP retirement plan was closed to new members; however, it continues to serve the retirement needs for about 14 active senior managers employed by the State of Florida and 100 inactive participants. The approved provider companies who receive ongoing contributions for the SMSOAP are EMPOWER (GREAT WEST), TIAA, VALIC, and VOYA. Great West maintains legacy investment products for SMSOAP participants. Section 121.055(6)(f)1., F.S., allows the Department to designate one (1) or more service provider companies.

The current and legacy SUSORP and SMSOAP investment products are provided on Column G in **ATTACHMENT E**.

### 1.3 Initial Term

The initial term of the contract resulting from this solicitation will be for three (3) years.

### 1.4 Renewal Term

Upon written agreement, the contract may be renewed in whole or in part, in accordance with 287.057(13), Florida Statutes. Any renewal is subject to the same terms and conditions set forth in the initial contract and any written amendments signed by the parties. Any renewal is contingent upon the satisfactory performance of the Contractor and subject to the availability of funds.

## 2 ITB OVERVIEW

### 2.1 Definitions

Definitions contained in section 287.012, F.S., Rule 60A-1.001, Florida Administrative Code, PUR 1000, General Contract Conditions, and the PUR 1001 form are incorporated by reference. In the event of a conflict, the definitions listed in this section supersede the incorporated definitions. All definitions apply in both their singular and plural sense.

**Bidder** – A Vendor who submits a bid to this ITB.

**Business Day** – Each day during which the State and its agencies are open for business, from 8:00 a.m. to 5:00 p.m. Eastern Time, Monday through Friday.

**Contract** - The written agreement resulting from this ITB.

**Contractor** - The business entity that is awarded a Contract resulting from this ITB.

**Department** - The Florida Department of Management Services.

**Division of Retirement (Division)** – A division within the State of Florida, Department of Management Services.

**SMSOAP** – Senior Management Service Optional Annuity Program. Pursuant to Section 121.055, Florida Statutes, the SMSOAP is a 403(b), Internal Revenue Code, qualified defined contribution retirement plan consisting of annuity investment products for State Personnel System Senior Managers and managerial staff of the Florida Legislature, Judicial Branch, Auditor General, and the State Board of Administration.

**State** – The State of Florida.

**SUSORP** – State University System Optional Retirement Program. Pursuant to Section 121.035, Florida Statutes, the SUSORP is a 403(b), Internal Revenue Code, qualified defined contribution retirement plan consisting of annuity and mutual fund investment products for state university faculty, administrators, and staff and employees participating in the State University System Executive Service.

**Vendor** – An entity that is in the business of providing a commodity or service similar to those within the solicitation.

**Vendor Bid System (VBS)** – The official State of Florida bidding system. (Section 287.042(3)(b)(2) F.S.)

### 2.2 Procurement Officer

The Procurement Officer is the sole point of contact from the date of release of this ITB until 72 hours after the intent to award is posted.

The Procurement Officer for this ITB is:

Jennifer Hyatt

Associate Category Manager, Division of State Purchasing  
Florida Department of Management Services

4050 Esplanade Way, Suite 360, Tallahassee, FL 32399-0950  
Phone: (850) 921-0030  
Email: [jennifer.hyatt@dms.myflorida.com](mailto:jennifer.hyatt@dms.myflorida.com)

\*\*\*\*ALL EMAILS TO THE PROCUREMENT OFFICER SHOULD CONTAIN THE SOLICITATION NUMBER IN THE SUBJECT LINE OF THE EMAIL\*\*\*\*

### **2.3 Limitation on Contact with Government Personnel (Section 287.057(23), F.S.)**

Bidders to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the 72-hour period following the agency posting the notice of intended award, excluding Saturdays, Sundays, and state holidays, any employee or officer of the executive or legislative branch concerning any aspect of this solicitation, except in writing to the procurement officer or as provided in the solicitation documents. Violation of this provision may be grounds for rejecting a response.

### **2.4 Responsiveness Requirements and Minor Irregularities**

The Department may reject any response not submitted in the manner specified by the solicitation documents. The use of terms such “shall,” “must,” “will,” or “required” in this solicitation indicates a mandatory requirement or condition. A deviation from a responsive requirement or condition is material if, in the Department’s sole discretion, the deficient bid is not in substantial accord with the solicitation requirements, provides a substantial advantage to one Bidder over another, or has a potentially significant effect on the quality of the bid or on the cost to the State. The Department may reject any bid or separable portions thereof that is not submitted in the manner specified by this solicitation. However, the Department reserves the right, in its discretion, to waive any minor irregularity, technicality, or omission of a bid response if the Department determines that it is in the best interest of the State to do so. There is no guarantee that the Department will waive a minor irregularity, technicality, or omission, or that any Vendor with a bid containing a minor irregularity, technicality, or omission will be considered for award of this procurement.

### **2.5 Department of State**

If awarded a Contract, the Bidder shall provide a PDF file of their current and active registration with the Department of State prior to contract execution. **NOTE:** Pursuant to section 607.1501, F.S., out-of-state corporations where required, must obtain a Florida Certificate of Authorization pursuant to section 607.1503, F.S., from the Florida Department of State, Division of Corporations, to transact business in the State of Florida. Website: [www.sunbiz.org](http://www.sunbiz.org).

### **2.6 Clarifying Information**

Upon receipt of the bid responses, the Department reserves the right to request clarifying information from a bidder if necessary. If the Department requests clarifying information and the bidder fails to timely provide the information requested, in the manner requested, or if the clarifying information does not satisfy the Departments inquiry regarding the bid requirements, the bid may be rejected as nonresponsive.

### **2.7 Special Accommodations**

Any person requiring a special accommodation due to a disability should contact the Department’s Americans with Disabilities Act (ADA) Coordinator at (850) 922-7535 at least five business days prior to the scheduled event. If you are hearing or speech impaired, please contact the ADA Coordinator by using the Florida Relay Service at (800) 955-8771 (TDD). The telephone numbers are supplied for notice purposes only.

## **2.8 Order of Priority for Solicitation**

In the event of a conflict, the conflict will be resolved in the following order of priority (highest to lowest):

- a) Scope of Work
- b) Price Sheet
- c) Draft Contract
- d) Addenda to Solicitation, if issued (in reverse order of issuance)
- e) This ITB document
- f) The remaining ITB attachments

## **3 ITB PROCESS**

The ITB is a method of competitively soliciting a commodity or contractual service pursuant to section 287.057(1)(a), F.S. The Department posts an ITB on the VBS to initiate the process. All questions regarding the ITB must be submitted in writing to the Procurement Officer via email by the date listed in the Timeline of Events. Bids must be submitted by the deadline listed in the timeline of events. The Department will open the bids in a public meeting. After the Department has verified the bids, the Department will post an agency decision in accordance with section 6, Basis of Award, on the VBS.

### **3.1 Who May Respond**

Vendors who are a Registered Investment Advisor (RIA) with the U.S. Securities and Exchange Commission (SEC) or a RIA Representative in accordance with the Investment Advisory Act of 1940 codified at 15 U.S.C. § 80b-1 through 15 U.S.C. § 80b-21 may respond to this solicitation.

### **3.2 Commitment to Diversity in Government Contracting**

The State of Florida is committed to supporting its diverse business industry and population through ensuring participation by woman-, veteran-, and minority-owned small businesses in the economic life of the State. The State of Florida Mentor Protégé Program connects certified business enterprises with private corporations for business development mentoring. The Department strongly encourages firms doing business with the State of Florida to consider participating in this initiative. More information on the Mentor Protégé Program may be obtained by contacting the Office of Supplier Diversity at (850) 487-0915 or [osdinfo@dms.myflorida.com](mailto:osdinfo@dms.myflorida.com).

The Department supports diversity in its procurement program, and requests that all subcontracting opportunities afforded by this solicitation enthusiastically embrace diversity. The award of subcontracts should reflect the vast array of citizens in the State of Florida. The Bidder can contact the Office of Supplier Diversity at (850) 487-0915 for information on certified business enterprises that may be considered for subcontracting opportunities.

### **3.3 Questions Submission**

Bidders must timely submit all questions during the Question and Answer period to the Procurement Officer via email. The questions must be RECEIVED NO LATER THAN the time and date reflected on the Timeline of Events. Bidders are strongly encouraged to raise any questions or concerns regarding this ITB, including those related to the proposed Contract terms and conditions, during the open question period.

For all submitted questions, bidders are to place the solicitation number in the subject line of the email, and use the following format:



Question #	Bidder Name	Section	Page #	Question

Questions will not constitute a formal protest of the specifications of the solicitation.

The Department will answer questions in accordance with the Timeline of Events. The Department will answer the timely submitted questions by issuing an addendum on the VBS. All bidders will be able to view the questions and answers posted on the VBS.

Bidders shall not contact any other employee of the State for information with respect to this solicitation. Each Bidder is responsible for monitoring the Vendor Bid System for new or changing information. The Department will not be bound by any verbal information or by any written information that is not contained in the solicitation documents or formally noticed and issued by the Department.

### **3.4 Addenda**

The Department reserves the right to modify this solicitation by addenda. Addenda may modify any aspect of this solicitation. Any addenda issued will be posted on the VBS. It is the Bidder's responsibility to check for any changes to a solicitation prior to submitting a bid.

### **3.5 Public Opening**

Bids will be opened on the date and at the location indicated in the Timeline of Events. Bidders are not required to attend. The Department generally does not announce prices or release other materials at this public meeting.

### **3.6 Electronic Posting of Notice of Intended Award**

The Department will electronically post a Notice of Intended Award on the VBS for review by interested parties at the time and location specified in the Timeline of Events. The Notice of Intended Award will remain posted for a period of 72 hours, not including weekends or State observed holidays. If the Notice of Intended Award is delayed, in lieu of posting the Notice of Intended Award, the Department may post a notice of delay and a revised date for posting the Notice of Intended Award.

### **3.7 Firm Response**

The Department intends to award a contract within 60 days after the date of the bid opening, during which period bids will remain firm and cannot be withdrawn. If an award is not made within 60 days, all bids will remain firm until either the Department awards the Contract, or the Department receives written notice from the Bidder that the bid is withdrawn.

### **3.8 Modification or Withdrawal of Bid**

Bidders are responsible for the content and accuracy of their bid. Bidders may modify or withdraw their bid at any time prior to the deadline to submit the bid in accordance with the Timeline of Events.

### **3.9 Cost of Response Preparation and Independent Preparation**

The costs related to the development and submission of a response to this ITB are the full responsibility of the Bidder and are not chargeable to the Department. A Bidder shall not, directly or indirectly, collude, consult, communicate or agree with any other Vendor or Bidder

as to any matter related to the response each is submitting. Additionally, a Bidder shall not induce any other Bidder to modify, withdraw, submit or not submit a bid.

### **3.10 Contract Formation**

The Department may issue a Notice of Intended Award to the successful Bidder(s). However, no contract will be formed between a Bidder and the Department until the Department signs the contract. The Department will not be liable for any work performed before the contract is effective.

No additional documents submitted by a Bidder will be incorporated in the contract unless it is specifically identified, incorporated by reference, and approved by the Department. If any additional documents are submitted by the Bidder, the additional documents will not be considered for the Basis of Award and may be rejected.

## **4 BID SUBMITTAL**

This section contains instructions to Bidders on how to submit a bid.

### **4.1 General Instructions and Special Instructions**

PUR 1001, the General Instructions to Bidders, is incorporated by reference into this solicitation and is provided via the link below:

<http://www.dms.myflorida.com/content/download/2934/11780/1001.pdf>

In the event any conflict exists between the Special Instructions and General Instructions to Bidders, the Special Instructions shall prevail.

### **The following sections of the PUR 1001 are modified as follows and are the Special Instructions:**

Section 3. Electronic Submission of Bids

Bids shall be submitted in accordance with the How To Submit A Bid Section of this solicitation.

Section 5. Questions

Questions shall be submitted in accordance with the Questions Submission Section of this solicitation.

Section 9. Respondent's Representation and Authorization

In submitting a response, each respondent understands, represents, and acknowledges the following:

- The respondent is not currently under suspension or debarment by the State or any other governmental authority.
- To the best of the knowledge of the person signing the response, the respondent, its affiliates, subsidiaries, directors, officers, and employees are not currently under investigation by any governmental authority and have not in the last ten (10) years been convicted or found liable for any act prohibited by law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract.
- Respondent currently has no delinquent obligations to the State, including a claim by the State for liquidated damages under any other contract.

- The submission is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive response.
- The prices and amounts have been arrived at independently and without consultation, communication, or agreement with any other respondent or potential respondent; neither the prices nor amounts, actual or approximate, have been disclosed to any respondent or potential respondent, and they will not be disclosed before the solicitation opening.
- The respondent has fully informed the Buyer in writing of all convictions of the firm, its affiliates (as defined in section 287.133(1)(a) of the Florida Statutes), and all directors, officers, and employees of the firm and its affiliates for violation of state or federal antitrust laws with respect to a public contract for violation of any state or federal law involving fraud, bribery, collusion, conspiracy or material misrepresentation with respect to a public contract. This includes disclosure of the names of current employees who were convicted of contract crimes while in the employ of another company.
- Neither the respondent nor any person associated with it in the capacity of owner, partner, director, officer, principal, investigator, project director, manager, auditor, or position involving the administration of federal funds:
  - Has within the preceding three years been convicted of or had a civil judgment rendered against them or is presently indicted for or otherwise criminally or civilly charged for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; or
  - Has within a three-year period preceding this certification had one or more federal, state, or local government contracts terminated for cause or default.
- The product offered by the respondent will conform to the specifications without exception.
- The respondent has read and understands the Contract terms and conditions, and the submission is made in conformance with those terms and conditions.
- If an award is made to the respondent, the respondent agrees that it intends to be legally bound to the Contract that is formed with the State.
- The respondent has made a diligent inquiry of its employees and agents responsible for preparing, approving, or submitting the response, and has been advised by each of them that he or she has not participated in any communication, consultation, discussion, agreement, collusion, act or other conduct inconsistent with any of the statements and representations made in the response.
- The respondent shall indemnify, defend, and hold harmless the Buyer and its employees against any cost, damage, or expense which may be incurred or be caused by any error in the respondent's preparation of its bid.

All information provided by, and representations made by, the respondent are material and important and will be relied upon by the Buyer in awarding the Contract. Any misstatement shall be treated as fraudulent concealment from the Buyer of the true facts relating to submission of the bid. A misrepresentation shall be punishable under law, including, but not limited to, Chapter 817 of the Florida Statutes.

#### **4.2 How to Submit a Bid**

Bidders are responsible for submitting their bids by the date and time specified in the Timeline of Events section of this solicitation. Bidders are to submit the bid in (a) properly marked, sealed box(es) containing the following:

- 4.2.1** One (1) original version of the bid submittal, with five (5) copies.

**4.2.2** One scanned copy of the entire bid in Adobe (.pdf) and price sheet(s) in Excel (.xlsx) on a thumb drive. Large files should be scanned as separate files.

**4.2.3** One **REDACTED** scanned copy of the bid, if applicable.

All electronic documents are to be searchable to the fullest extent practicable. Paper and electronic copies of bids are to consist of identical information. In the event of a conflict between the copies, the original paper bid controls.

**Clearly mark on the outside of the sealed package the solicitation number, company name, and Procurement Officer Name.**

Submit bids to the address listed in the Procurement Officer Section of this ITB.

Bidders are responsible for submitting their bids by the date and time specified in the Timeline of Events section of this solicitation. Bids that are not timely submitted with all required information may be deemed nonresponsive. Do not submit mass produced general information/promotional material about the Bidder that is prepared/printed for general distribution. Bidder's bid should be prepared simply and economically, providing a straightforward, concise delineation of the Bidder's capabilities to satisfy the requirements of this solicitation.

By submitting a bid to this solicitation, the Bidder agrees to and waives any objections to requirements contained in the solicitation. By submitting a bid, the Bidder certifies that it agrees to and satisfies all requirements specified in this solicitation.

**Bidders that fail to submit the required information will be deemed nonresponsive.**

The mandatory required information for this solicitation includes:

- 1) A signed Attachment C, Responsiveness Requirements, and;
- 2) A signed Attachment H, Price Sheet, with prices in each yellow highlighted cell.

Bidders are responsible for submitting their bids by the date and time specified in the Timeline of Events of this solicitation.

Attachments submitted should be named similarly to the following file naming conventions:

**Example:** JohnDoeLLC\_Attachment\_(X).pdf  
JohnDoeLLC\_Price\_Sheet.xlsx (Excel)

#### **4.3 Price Sheet Instructions**

The Bidder must submit Attachment H (Price Sheet), with a price in each highlighted yellow cell, which includes initial term pricing and renewal term pricing for quarterly and annual investment performance reviews and reports, as well as ad hoc consulting services. Bidders shall provide a price for four quarterly investment performance reviews, four quarterly investment performance reports, one annual comprehensive investment performance review, and one annual comprehensive investment performance report, in accordance with Attachment B (Statement of Work), for each fiscal year of the initial and the renewal terms. For ad hoc consulting services, in

accordance with Attachment B (Statement of Work), Bidders shall provide an hourly rate for all years of the initial term and a rate for all years of the renewal term.

**Failure to provide a price in every highlighted cell will result in the Bidder being non-responsive.**

## **5 PRIOR TO AWARD**

### **5.1 Rejection of Bids**

Bids that do not meet all requirements, specifications, terms, and conditions of the solicitation or fail to provide all required information, documents, or materials may be rejected as non-responsive. Do not provide any conditions to the bid. Any conditions provided by a vendor will be rejected, or the bid will be found nonresponsive. Bidders whose bids, references, or current status do not reflect the capability, integrity, or reliability to fully and in good faith perform the requirements of a contract may be rejected as not responsible. The Department reserves the right to determine which bids meet the requirements of this solicitation, and which Bidders are responsive and responsible. The Department may, in its sole discretion, independently verify any information provided by the Bidder, including information related to the responsiveness requirements and certifications thereto.

### **5.2 Redacted Submissions**

The following section supplements section 19 of the PUR 1001. If a Bidder considers any portion of the documents, data or records submitted in response to this solicitation to be confidential, proprietary, trade secret or otherwise not subject to disclosure pursuant to Chapter 119, F.S., the Florida Constitution or other authority, in order to maintain the confidentiality, the Bidder must mark the document as "Confidential" and simultaneously provide the Department with a separate redacted copy of its response and briefly describe in writing the grounds for claiming exemption from the public records law, including the specific statutory citation for such exemption. This redacted copy shall contain the Department's solicitation name, number, and the Bidder's name on the cover, and shall be clearly titled "Redacted Copy." The Redacted Copy should only redact those portions of material that the Bidder claims is confidential, proprietary, trade secret or otherwise not subject to disclosure.

In the event of a request for public records pursuant to Chapter 119, F.S., the Florida Constitution or other authority, to which documents that are marked as confidential are responsive, the Department will provide the Redacted Copy to the requestor. If a requestor asserts a right to the Confidential Information, the Department will notify the Bidder such an assertion has been made. It is the Bidder's responsibility to assert that the information in question is exempt from disclosure under Chapter 119, F.S., or other applicable law. If the Department becomes subject to a demand for discovery or disclosure of the Confidential Information of the Bidder in a legal proceeding, the Department will give the Bidder prompt notice of the demand prior to releasing the information (unless otherwise prohibited by applicable law). The Bidder shall be responsible for defending its determination that the redacted portions of its response are confidential, proprietary, trade secret, or otherwise not subject to disclosure.

By submitting a bid, the Bidder agrees to protect, defend, and indemnify the Department for any and all claims arising from or relating to the Bidder's determination that the redacted portions of its bid are confidential, proprietary, trade secret, or otherwise not subject to disclosure. If Bidder fails to submit a redacted copy of information it claims is confidential, the Department is

authorized to produce the entire documents, data, or records submitted to the Department in answer to a public records request for these records.

## **6 BASIS OF AWARD**

The Bidder shall submit Attachment H (Price Sheet) in accordance with the Price Sheet Instructions Section of this ITB. The Contract will be awarded to the one (1) responsible and responsive bidder with the highest Total Price Sheet Score. The Department reserves the right to accept or reject any and all offers, and to waive any minor irregularity, technicality, or omission if the Department determines that doing so will serve the best interest of the State.

### **6.1 Initial Term Reviews and Reports (Total Max Points 54)**

The Bidder with the lowest Initial Term (Years 1-3) TOTAL (Attachment H, Cell D33) will receive 54 points. Other Bidders will receive points based upon the following formula:

$$\frac{(X)}{N} \times 54 = Z$$

Where:

X = Lowest Initial Term (Years 1-3) TOTAL of all bids submitted

N = Bidder's submitted Initial Term (Years 1-3) TOTAL

Z = Initial Term Reviews and Reports Points awarded

### **6.2 Renewal Term Reviews and Reports (Total Max Points 36)**

The Bidder with the lowest Renewal Term (Years 4-6) TOTAL (Attachment H, Cell D53) will receive 36 points. Other Bidders will receive points based upon the following formula:

$$\frac{(X)}{N} \times 36 = Z$$

Where:

X = Lowest Renewal Term (Years 4-6) TOTAL of all bids submitted

N = Bidder's submitted Renewal Term (Years 4-6) TOTAL

Z = Renewal Term Reviews and Reports Points awarded

### **6.3 Initial Term Ad Hoc Consulting Services (Total Max Points 6)**

The Bidder with the lowest Initial Term (Years 1-3) Hourly Rate (Attachment H, Cell B59) will receive 6 points. Other Bidders will receive points based upon the following formula:

$$\frac{(X)}{N} \times 6 = Z$$

Where:

X = Lowest Initial Term (Years 1-3) Hourly Rate of all bids submitted

N = Bidder's submitted Initial Term (Years 1-3) Hourly Rate

Z = Initial Term Ad Hoc Consulting Services Points awarded

### **6.4 Renewal Term Ad Hoc Consulting Services (Total Max Points 4)**

The Bidder with the lowest Renewal Term (Years 4-6) Hourly Rate (Attachment H, Cell B60) will receive 4 points. Other Bidders will receive points based upon the following formula:

$$\frac{(X)}{N} \times 4 = Z$$

Where:

X = Lowest Renewal Term (Years 4-6) Hourly Rate of all bids submitted

N = Bidder's submitted Renewal Term (Years 4-6) Hourly Rate

Z = Renewal Term Ad Hoc Consulting Services Points awarded

#### **6.5 Total Price Sheet Score (Total Max Points 100)**

The Bidder's Total Price Sheet Score will be calculated by the Department using the following formula: Initial Term Reviews and Reports points awarded (+) Renewal Term Reviews and Reports points awarded (+) Initial Term Ad Hoc Consulting Services points awarded (+) Renewal Term Ad Hoc Consulting Services points awarded = Total Price Sheet Score.

### **ITB ATTACHMENTS**

Attachment A Draft Contract

Attachment B Statement of Work

Attachment E SUSORP/SMSOAP Products

#### **Mandatory Responsiveness Attachments and Documents:**

Attachment C Responsiveness Requirements

Attachment H Price Sheet

#### **Additional Documents to be Submitted with the Bid:**

Attachment D Vendor Information

Attachment F No Offshoring

Attachment G Certification of Drug-Free Workplace