

Indiana Department of Administration

on behalf of

Indiana Department of Workforce Development

Request for Proposal 19-100

Unemployment Insurance Benefit Payment Distribution

Pre-Proposal Conference

April 8, 2019
10:00 AM

David Brandon-Friedman, Senior Account Manager

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Agenda

- General Information
- Purpose of RFP
- Key Dates
- Proposal Preparation & Evaluation
- Minority and Women's Business Enterprises (M/WBE)
- Question and Answer Session



General Information

- Sign-In Sheet for Attendees
- Sign-In Sheet and PowerPoint presentation will be posted on IDOA's Solicitation Website
- Hold questions until the end of the presentation
 - *Any verbal response given during this meeting is **not** considered binding; respondents are encouraged to submit any question formally in writing if it affects the proposal that will be submitted to the state.*



Purpose of the RFP

The purpose of this RFP is to select a vendor that can satisfy the State's need for Unemployment Insurance Benefit Payment Distribution.

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Term of RFP

- Contract Term
 - The term of the contract shall be for a period of four (4) years from the date of contract execution. There may be one three-year (3) renewal for a total of seven (7) years at the State's option.



Key Dates

Activity	Date
Issue of RFP	March 28, 2019
Pre-Proposal Conference	April 8, 2019
Deadline to Submit Written Questions	April 9, 2019
Response to Written Questions/RFP Amendments	April 16, 2019
Submission of Proposals	May 9, 2019
<i>The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.</i>	
Proposal Evaluation	TBD
Proposal Discussions/Clarifications (if necessary)	TBD
Oral Presentations (if necessary)	TBD
Best and Final Offers (if necessary)	TBD
RFP Award Recommendation	June 2019

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Business Proposal

(Attachment D)

- **Company Financial Information (Section 2.3.3)**
 - Confidential information must be kept separate from the proposal
- **Contract Terms (Section 2.3.5)**
 - Respondent should review sample State contract (Attachment B) and note any exceptions to State mandatory and non-mandatory clauses in their Transmittal Letter

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Technical Proposal

(Attachment E)

- Please use the Template provided for you. Do Not Alter this documents in any way
- Where appropriate, supporting documentation may be referenced by a page and paragraph number.

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Cost Proposal

(Attachment C)

- Please use the Template provided for you. Do Not Alter this documents in any way

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Cost Proposal

(Attachment C)

Use cell C6 of Attachment C when calculating M/WBE participation

Total Cost Amount	\$ -
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Activity	Cost Description	Cost Each
Program Setup	This fee is charged by the Contractor to the State to create / initiate a payment distribution program.	
Recipient Setup	This fee is charged by the Contractor each time the Contractor needs to create an account for each individual recipient	

Information Only Section

[illegible]

Cost Proposal

(Attachment C)

Activity	Cardholder Cost	Fee Description
Account		
Initial Account Setup	\$ -	No charge
Card Issuance	\$ -	No charge
Multiple Cards	\$ -	No charge
Monthly Service	\$ -	No charge
Pin Changes	\$ -	No charge
Web Initiated Activities	\$ -	No charge
Inactive Account	\$ -	No charge
Account Closure	\$ -	No charge
Negative Balance	\$ -	No charge
Point-of-Sale (POS) Transaction	\$ -	No charge
ATM / Bank Teller		
In-Network* ATM Cash Withdrawal	\$ -	No charge
Out-of-Network* ATM Cash Withdrawal		The Cardholder receives one free out-of-network withdrawal for each deposit loaded onto the Card. This free out-of-network withdrawal includes use at either out-of-network domestic ATMs OR international ATMs. The Contractor may charge for each withdrawal in excess of the first free out-of-network withdrawal. If unused, it will
Card Alternative Fee Proposal		Other +

Proposal Evaluation

Summary of Evaluation Criteria:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	55 available points
3. Cost (Cost Proposal)	20 available points
6. Minority Business Enterprise Subcontractor Commitment	5 (1 bonus point is available, see Section 3.2.6)
7. Women Business Enterprise Subcontractor Commitment	5 (1 bonus point is available, see Section 3.2.6)
Total	85 (87 if bonus awarded)

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Minority and Women's Business Enterprises

Mission/Vision

- Promote, monitor, and enforce the standards for certification of minority and women's business enterprises.
- Provide equal opportunity to minority and women enterprises in the state's procurement and contracting process.

Nondiscrimination and Antidiscrimination Laws

- Pursuant to Indiana Civil Rights Law, specifically IC §22-9-1-10, every state contract shall contain a provision requiring the contractor and subcontractors to not discriminate against any employee or applicant with respect to Protected Characteristics



Minority and Women's Business Enterprises

Contact Information

- Phone: 317-232-3061
- E-mail: mwbecompliance@idoa.in.gov
- Web: www.in.gov/idoa/mwbe

Complete Attachment A, MWBE Form

- Include sub-contractor letter of commitment

Goals for Proposal

- 8% Minority Business Enterprise
- 8% Women's Business Enterprise



**ATTACHMENT A
MINORITY & WOMEN'S BUSINESS ENTERPRISES RFP SUBCONTRACTOR
COMMITMENT FORM**

In accordance with 25 IAC 5-5, the respondent is expected to submit with its proposal a Minority & Women's Business Enterprises RFP Subcontractor Commitment Form. The Form must show that there are, participating in the proposed contract, Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) listed in the Minority and Women's Business Enterprises Division (MWBED) directory of certified firms located at <http://www.in.gov/idca/2352.htm>.

If participation is met through use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of products and/or services provided that are directly related to this proposal and the cost of direct supplies for this proposal. Respondents must complete the Subcontractor Commitment Form in its entirety. The amount entered in "TOTAL BID AMOUNT" should match the amount entered in the Attachment D, Cost Proposal Template.

Failure to meet these goals will affect the evaluation of your Proposal. The Department reserves the right to verify all information included on the MWBE Subcontractor Commitment Form.

Prime Contractors must ensure that the proposed subcontractors meet the following criteria:

- Must be listed on the IDCA Directory of Certified Firms, on or before the proposal due date
- Prime Contractor must include with their proposal the subcontractor's M/WBE Certification Letter provided by IDCA, to show current status of certification.
- Each firm may only serve as one classification – MBE, WBE, or IVOSB (see section 1.22)
- A Prime Contractor who is an MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- Must serve a Valuable Scope Contribution (VSC). The firm must serve a value-added purpose on the engagement, as confirmed by the State.
- Must provide goods or service only in the industry area for which it is certified as listed in the directory at <http://www.in.gov/idca/2352.htm>
- Must be used to provide the goods or services specific to the contract
- National Diversity Plans are generally not acceptable

**MINORITY & WOMEN'S BUSINESS ENTERPRISES RFP SUBCONTRACTOR LETTER OF
COMMITMENT (MWBE)**

A signed letter(s), on company letterhead, from the MBE and/or WBE must accompany the MWBE Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the MBE and/or WBE of its subcontract amount, a description of products and/or services to be provided on this project, and approximate date the subcontractor will perform work on this contract. The MBE and/or WBE subcontractor amount and subcontractor percentage is only based on the initial term of the contract, unless the products and/or services are needed beyond the initial term. Any products and/or services desired after the initial term will require separate negotiations between the prime contractor and subcontractor. The State may deny evaluation points if the letter(s) is not attached, not on company letterhead, not signed and/or does not reference and match the subcontract amount, subcontract amount as a percentage of the "TOTAL BID AMOUNT" and the anticipated period that the Subcontractor will perform work for this solicitation.

By submission of the Proposal, the Respondent acknowledges and agrees to be bound by the regulatory processes involving the State's M/WBE Program. Questions involving the regulations governing the MWBE Subcontractor Commitment Form should be directed to: Minority and Women's Business Enterprises Division at (317) 232-3061 or <http://www.in.gov/idca/2352.htm>.

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Minority and Women's Business Enterprises

Prime contractors must ensure that the proposed subcontractors meet the following criteria:

- Are listed in the IDOA Directory of Certified Firms, on or before the proposal due date, national diversity plans are generally not accepted. The directory can be found here: <http://www.in.gov/idoa/mwbe/2743.htm>
- **Serve a Valuable Scope Contribution (VSC) on the engagement, as confirmed by the State.**
- Provide the goods or services specific to the contract and within the industry area for which it is certified

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Minority and Women's Business Enterprises

Prime contractors should note the following:

- Subcontractors' MBE/WBE Certification Letter, provided by IDOA, must accompany the proposal to show current status of certification.
- Each firm may only serve as one classification – MBE or WBE (see section 1.22)
- Pursuant to 25 IAC 5-6-2(b)(d), a Prime Contractor who is a MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.



STATE OF INDIANA MBE/WBE SUBCONTRACTOR COMMITMENT FORM

RFP# _____

DUE DATE: _____

TOTAL BID AMOUNT: _____

<input type="checkbox"/> MBE Firm <input type="checkbox"/> WBE Firm		
Company Name:	Contact Person:	
Address:	E-mail:	
	Telephone Number: ()	Fax Number: ()
Sub-Contract Amount:	Describe service/product to be provided and <u>how this is a Valuable Scope Contribution of the Contract:</u>	
Sub-Contract Percentage of Total Bid:		
Provide approximate dates when Sub-Contractor will perform on this project:		

<input type="checkbox"/> MBE Firm <input type="checkbox"/> WBE Firm		
Company Name:	Contact Person:	
Address:	E-mail:	
	Telephone Number: ()	Fax Number: ()
Sub-Contract Amount:	Describe service/product to be provided and <u>how this is a Valuable Scope Contribution of the Contract:</u>	
Sub-Contract Percentage of Total Bid:		
Provide approximate dates when Sub-Contractor will perform on this project:		

Respondent Firm	Telephone Number
Address	Fax Number
City/State/Zip Code	Email Address
Representative	Authorizing Signature
Date	Printed Name and Title

☐ Please check if additional forms are attached.
Page _____ of _____

FORM MUST BE COMPLETED IN ITS ENTIRETY WITH COMPLETED LETTERS OF COMMITMENT.

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Minority and Women's Business Enterprises

STATE OF INDIANA MBE/WBE SUBCONTRACTOR COMMITMENT FORM

RFP# _____

DUE DATE: _____

➡ TOTAL BID AMOUNT: _____

➡ ☐ MBE Firm ☐ WBE Firm

Company Name: _____

Address: _____

➡ Sub-Contract Amount: _____

➡ Sub-Contract Percentage of Total Bid: _____

Contact Person: _____

E-mail: _____

Telephone Number:
()

Fax Number:
()

Describe service/product to be provided and how this is a Valuable Scope Contribution of the Contract:

Provide approximate dates when Sub-Contractor will perform on this project: _____



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Minority and Women's Business Enterprises

- **New Process** – Effective 2014, MWBE scoring is conducted based on 10 points plus a possible 2 bonus points scale
 - MBE: Possible 5 points + 1 bonus point
 - WBE: Possible 5 points + 1 bonus point
- **Professional Services Scoring Methodology:**
 - The points will be awarded on the following schedule:

%	1%	2%	3%	4%	5%	6%	7%	8%
Pts.	.625	1.25	1.875	2.5	3.125	3.75	4.375	5.0

Fractional percentages will be rounded up or down to the nearest whole percentage

- If the respondent's commitment percentage is rounded down to 0% for MBE or WBE participation the respondent will receive 0 points.
- Submissions of 0% participation will result in a deduction of 1 point in each category
- The highest submission which exceeds the goal in each category will receive 6 points (5 points plus 1 bonus point). In case of a tie both firms will receive 6 points

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IDOA Subcontractor Scoring

RFP MWBE Scoring Example

Bidder	MBE %	Pts.	WBE %	Pts.	Total Pts.
Bidder 1	12.0%	5.0	10.0%	6.0	11.0
Bidder 2	6.0%	3.75	4.0%	2.5	6.25
Bidder 3	8.0%	5.0	8.0%	5.0	10.0
Bidder 4	16.0%	6.0	0.2%	0.0	6.0
Bidder 5	0.0%	-1.0	0.0%	-1.0	-2.0

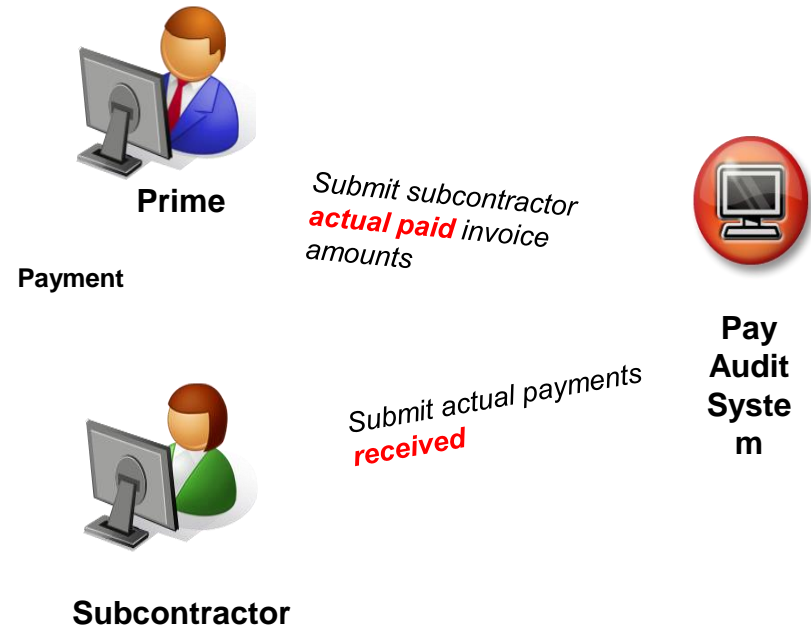
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Subcontractor Compliance

Pay Audit System

- Tool utilized to monitor the state's diversity spend for subcontractors
- Selected primes and subcontractors are required to report payments submitted or received through this web-based tool
- Based on contract terms payments should be reported monthly or quarterly
- **Questions?** Contact Division of Supplier Diversity
 - mwbecompliance@idoa.in.gov
 - www.in.gov/idoa/mwbe/payaudit.htm



Required Forms / Documents

- Transmittal Letter

Clearly identify a point of contact

Include any exceptions to Attachment B sample contract

- Attachment A M/WBE Participation Plan

M/WBE Certification Letter from IDOA

Signed Commitment Letter from M/WBE

- Attachment C Cost Proposal

- Attachment D Business Proposal

- Attachment E Technical Proposal

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Additional Information

IDOA PROCUREMENT LINKS AND NUMBERS

<http://www.in.gov/idoa/2354.htm>

- A. Link to the developing for bidder registry with IDOA and Secretary of State.
<http://www.in.gov/idoa/2464.htm>
- B. Secretary of State of Indiana:
Can be reached at (317) 232-6576 for registration assistance. www.in.gov/sos
- C. See Vendor and Supplier Resource Center:
<http://www.in.gov/idoa/3106.htm>
- D. Minority and Women Owned Business Enterprises:
Link to more information and full listing of IDOA Minority and Women Owned Businesses
<http://www.in.gov/idoa/2352.htm>
- F. RFP posting and updates:
Go to <http://www.in.gov/idoa/2354.htm> (select “Current Opportunities” link)
Scroll through table until you find desired RFP number on left-hand side and click the link.

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Questions

Any verbal response given during this meeting is not considered binding; respondents are encouraged to submit all questions formally in writing on Attachment F to rfp@idoa.IN.gov .

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Thank You

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