

REQUEST FOR PROPOSAL (24-74659)
VACCINATION, IMMUNIZATION, SCHEDULING, INVENTORY, TESTING, AND
CLAIMS (VISIT) SYSTEM

INDIANA DEPARTMENT OF ADMINISTRATION
ON BEHALF OF
INDIANA DEPARTMENT OF HEALTH

PRE-PROPOSAL CONFERENCE

MARCH 22, 2023

SYED MOHAMMAD
IDOA/PROCUREMENT DIVISION



Agenda

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General Information

- This Pre-Proposal presentation will be posted on IDOA's Solicitation Website
- Potential Respondents (Prime Contractors and subcontractors) will be given the opportunity to express interest in this solicitation and to have their company and contact information posted to the solicitation website by submitting the Pre-Proposal Network Opportunities Form (Attachment I) to rfp@idoa.in.gov no later than **3:00 PM ET on March 24, 2023**. This form is optional.
- Potential Respondents to the solicitation are encouraged to submit any questions pertaining to the solicitation via the Question/Inquiry process. Please use Attachment G of this RFP for this purpose. Questions regarding the solicitation must be submitted by **3:00 PM ET on March 24, 2023**.
- Part One of the submission process is due no later than 3:00 PM ET on April 17, 2023.
- Part Two of the submission process is due no later than 4:30 PM ET on April 20, 2023.



Purpose of the Solicitation

- The purpose of this solicitation is to select a Respondent that can satisfy the State's need for the design, development, and implementation of a Vaccination, Immunization, Scheduling, Inventory, Testing (VISIT) and Claims System, including associated Maintenance and Operations (M&O) services and System Enhancement services.
- It is the intent of IDOH to contract with a respondent that provides a proven, comprehensive, and fully developed federally and state compliant system for managing the VISIT.



Scope of Work (Attachment L)

The Contractor shall implement a system which will:

- Allow individuals and families to be able to track and schedule required immunizations and medical testing for school, work, and travel and to address health matters through an easy-to-use process that connects seamlessly to the data stored in the system and inputted by providers.
- Allow providers to conduct billing activities, submit claims, schedule appointments, inventory status of immunization and testing materials, and seamlessly connect data sources.
- Track inventory of tests and immunizations.
- Follow strict security protocols to ensure the safety and security of Hoosiers' private and sensitive health information.
- Additionally, IDOH desires a comprehensive solution that is scalable and future-proof to allow rapid and efficient adaptation in the event of future public health crises or disease outbreaks. IDOH expects the solution to be offered as a cloud Software as a Service (SaaS)



Questions – Scope of Work

- Verbal responses provided today are non-binding. For binding responses please submit a question/inquiry through the Q&A matrix (Attachment G).
- All questions/inquiries should be submitted by 3:00 pm ET, March 24, using the Q&A Matrix (Attachment G) as outlined in Section 1.7 of the RFP main document.



Indiana Office of Technology Security Protocols

- The Contractor shall meet all requirements for Indiana Office of Technology security protocols. Please see this link for more information and on how to access the Information Security Framework (ISF): <https://www.in.gov/information-security-framework/>.
- As the instructions indicate, Respondents will need to complete the nondisclosure agreement (NDA) available on the webpage and return the completed document to IOT via email to IOTISFRequests@iot.IN.gov. Details of what to include on your request can be found on the webpage.



Term of Contract

- The term of the contract shall be for a period of **Three (3) years** from the date of contract execution.
- There may be **Three (3) one-year renewals** for a **total of Six (6) years** at the State's option.



Key Dates

Activity	Date
Issue of solicitation	March 17, 2023
Pre-Proposal Conference	March 22, 2023, 3:00 pm ET
Deadline to Submit Pre-proposal Network Opportunities Form (Attachment I)	March 24, 2023, 3:00 pm ET
Deadline to Submit Written Questions (Attachment G)	March 24, 2023, 3:00 pm ET
Response to Written Questions/Amendments	March 31, 2023
Deadline to Submit Letter of Intent to Respond Form (Attachment K)	April 3, 2023, 3:00 pm ET
Submission Process Part One: (Submission Form and Required Attachments)	April 17, 2023, 3:00 pm ET
Submission Process Part Two (Submission of Proposals on Flash Drive)	April 20, 2023, 4:30 pm ET
Submission of Reference Check Forms to State	April 20, 2023, 3:00 pm ET



Executive Summary (*Part One Submission*)

The Executive Summary must be completed and submitted via Part One of the submission process. At a minimum, your Executive Summary must address the following (also outlined in Section 2.2 of the RFP):

- Summarize your ability and desire to supply the required services
- Make sure the Executive Summary is signed by an authorized representative
 - *Include your primary contact*
- State your understanding of the respondent notification
- Indicate your status regarding Secretary of State registration
- You may include additional “cover letter” information within the Executive Summary if desired.



Attestation Form (*Part One Submission*)

The Attestation Form (Attachment J) must be completed and returned via Part One of the submission process.

- Mandatory Submission and Requirements
- Confirm Mutual Understanding and Submission
- Claim Clarification (Buy Indiana), if applicable
- Confidential / Redacted File Information
- Respondent additional attachments
- Subcontractors per RFP 2.3.10 and 2.6.4



Confidential Information

Confidential Information (RFP Main Document - Section 1.15)

- All materials contained in proposals are subject to the Access to Public Records Act (APRA) and can be accessed by any member of the public after contract award. The responses are deemed to be “public records” unless a specific provision of IC 5-14-3 protects it from disclosure.
- In order to request certain information be kept confidential, Respondents must claim a statutory exception to the APRA in their Attestation Form (Attachment J), including describing which specific provision applies to which specific part of their response.
- Confidential information must also be clearly marked and kept separate from the proposal in the electronic copies. IDOA recommends sending a “public” file that has the confidential information redacted (may be in PDF format) and a “final” file that includes all required information (must be in format provided).

DO NOT LABEL YOUR ENTIRE RESPONSE AS CONFIDENTIAL



Business Proposal (Attachment E)

■ Company Financial Information (RFP Section 2.3.4)

- This section must include documents to demonstrate the Respondent's financial stability. Examples of acceptable documents include most recent Dunn & Bradstreet Business Report (preferred) or audited financial statements for the two (2) most recently completed fiscal years. If neither of these can be provided, explain why, and include an income statement and balance sheet, for each of the two most recently completed fiscal years.
- If the documents being provided by the Respondent are those of a parent or holding company, additional information should be provided for the entity/organization directly responding to this RFP. That additional information should explain the business relationship between the entities and demonstrate the financial stability of the entity/organization which is directly responding to this RFP.

■ Contract Terms (RFP Section 2.3.6)

- Please provide the requested information in RFP Section 2.3.6. Additional rows may be added if necessary.

■ References (RFP Section 2.3.7)

- Respondents must have at least three (3) references who:
 - Can speak to the Respondent's experience in providing products and/or services that are the same, or similar, to those products and/or services requested in this solicitation
 - Can speak to the Respondent's performance on contracts of similar scope for government clients
- Respondents must ask each reference to complete Attachment H - Reference Check Form and email it directly to IDOA (idoareferences@idoa.in.gov) by April 20, 2023, 3:00 PM ET.



Technical Proposal (Attachment F)

- The Technical Proposal must be divided into the sections as described in Attachment F.
- Every point made in each section must be addressed in the order given. The same outline numbers must be used in the response.
- Where appropriate, supporting documentation may be referenced by a page and paragraph number. However, when this is done, the body of the Technical Proposal must contain a meaningful summary of the referenced material. The referenced document must be included as an appendix to the technical proposal with referenced sections clearly marked. If there are multiple references or multiple documents, these must be listed and organized for ease of use by the State.
- The Technical Proposal should not exceed 100 pages, excluding attachments.



Functional Requirements Matrix

(Attachment N)

- Please respond to all of the functions in the Questionnaire tab. Descriptions of the available responses are provided below. For each function enter an "X" under the response column that best describes your solution's ability to meet that functionality or an equivalent requiring customization.
- Use the Comments cell in column H to respond to every functionality for which you have selected the "Planned" or "NA" option, and please describe when your solution will meet the functional requirement or why it will not. For every functionality for which you have selected the "Customization Required" option please describe the expected level of effort and any risks associated with that customization. Additional comments in column H are not required for functional requirements with "Existing" responses.



Cloud Questionnaire and Terms

(Attachments M, B1-B3)

- Please complete Attachment M – Cloud Questionnaire. Any “assessment responses” contained within this questionnaire were provided so that the Indiana Office of Technology would be able to evaluate the extent to which a particular product or service aligns with the State of Indiana’s required security controls. It is not to be disclosed publicly, under Ind. Code §§ 5-14-3-4(a)(4) and (b)(10), unless disclosure is required by law.
- Additional exhibits outlining the State’s Cloud Terms and Conditions are also contained in Attachments B1, B2 and B3, respectively Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS), and Software-as-a-Service (SaaS). These additional exhibits are applicable to any vendor proposing a Cloud Computing service.



Cost Proposal (Attachment D)

- Please complete the template provided for the Cost Proposal by populating ONLY the yellow shaded cells.
- Attachment D (Cost Proposal) must be returned in the original **Excel** format.
- Cost scores will then be normalized to one another, based on the lowest cost proposal evaluated. The lowest cost proposal receives a total of 25 points. The normalization formula is as follows:

$$\text{Respondent's Cost Score} = (\text{Lowest Cost Proposal} / \text{Total Cost of Proposal}) \times 25$$



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659
Attachment D - Cost Proposal
Cost Summary

Respondents must fill in Respondent Name cell on the summary tab, and it will automatically populate on all other tabs

Respondent Name:

INSTRUCTIONS: The following will be used to assign cost points. Other than entering the Respondent's name at the top of the page, there is no response necessary on this worksheet.

Cost Summary

Component	Year 1 Cost (7/1/23-6/30/24)	Year 2 Cost (7/1/24-6/30/25)	Year 3 Cost (7/1/25-6/30/26)	Year 4 Cost (7/1/26-6/30/27) - Optional	Year 5 Cost (7/1/27-6/30/28) - Optional	Year 6 Cost (7/1/28-6/30/29) - Optional	Total
DDI	\$ -						\$ -
M&O	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Enhancements							\$ -
Licenses / Subscriptions / Environment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

The cost per year is calculated using the sum of all cost types for that year

TOTAL BID AMOUNT (3 Year Base Contract Total - use this total for Attachment A and A1)

Total bid will be calculated as the sum total of the base contract costs (years 1-3)



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659
Attachment D - Cost Proposal
Staff Rates

Respondent Name: 0

INSTRUCTIONS: Fill in the yellow-shaded cells to reflect staff rates. Blue cells will populate automatically. Enter as a separate line each staff position included in the Respondent's staffing plan for executing all components of the RFP scope. Provide the hourly rate for each position, inclusive of administrative overhead and any anticipated travel costs, for the initial contract term and the optional contract extension years.

Respondents will fill in the hourly rate for each position for years 1-3 of the contract term

Respondents will then fill in the hourly rate for each position for optional years 4-6

The % increase in hourly rate will automatically calculate based on the hourly rates provided for the initial term and optional years

Respondents will fill in any additional staff positions in addition to the Vital Positions

Position	Hourly Rate (Initial Term)	Hourly Rate (Optional Years)	Rate Increase %
<i>Example: Analyst</i>	\$50.00	\$51.50	3%
Executive Lead (Vital Position)			
Project Manager (Vital Position)			
Account Manager (Vital Position)			
M&O Manager (Vital Position)			
Lead Architect (Vital Position)			
Implementation Lead (Vital Position)			
Database Administrator (Vital Position)			
Data Migration Lead (Vital Position)			
OCM Lead (Vital Position)			
Training Lead (Vital Position)			
Testing Lead (Vital Position)			
Release Manager (Vital Position)			
(Respondent to fill in)			
(Respondent to fill in)			
(Respondent to fill in)			
(Respondent to fill in)			
(Respondent to fill in)			
(Respondent to fill in)			
(Respondent to fill in)			
(Respondent to fill in)			



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659
Attachment D - Cost Proposal
Design, Development, and Implementation Costs

Respondent Name: 0

INSTRUCTIONS: Please fill in the cells shaded yellow in Table 2 to indicate the estimated staff hours by position needed to complete the DDI work, from Project Kick Off through Statewide Implementation per the Scope of Work. Blue cells will populate automatically.

Table 1: Total DDI Cost

DDI Milestone	Percentage of Total DDI Payment Cost	Payment Amount
1: Completion of Requirements Validation	5%	\$0.00
2: Completion of Design and Development	35%	\$0.00
3: Completion of Data Migration and Testing	30%	\$0.00
4: Completion of Statewide Implementation and Training	30%	\$0.00
Total	100%	\$0.00

The total payment amount for each DDI milestone will automatically calculate based on each position's number of hours required for DDI work, based on Table 2 below

Table 2: Hours By Position

If pilot implementation is a part of the Respondent's proposed approach, be sure to include in the chart below the work related to the M&O services required between the pilot implementation and statewide implementation.

Position (auto-populated from Staff sheet)	Total Hours	Total Cost
Example: Analyst	80	\$ 4,000.00
Executive Lead (Vital Position)		\$ -
Project Manager (Vital Position)		\$ -
Account Manager (Vital Position)		\$ -
M&O Manager (Vital Position)		\$ -
Lead Architect (Vital Position)		\$ -
Implementation Lead (Vital Position)		\$ -
Database Administrator (Vital Position)		\$ -
Data Migration Lead (Vital Position)		\$ -
OCM Lead (Vital Position)		\$ -
Training Lead (Vital Position)		\$ -
Testing Lead (Vital Position)		\$ -
Release Manager (Vital Position)		\$ -
(Respondent to fill in)		\$ -
(Respondent to fill in)		\$ -
(Respondent to fill in)		\$ -

Respondents will provide the total number of hours needed by each position to complete DDI work

Total cost will then be calculated using the data entered in the 'Total Hours' column, multiplied by the hourly cost for the position as entered on the "Staff Rates" tab

Not expected to start prior to the M&O phase. Likely not needed prior to implementation.

Not expected to start prior to M&O phase. Expected to replace the



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659 Attachment D - Cost Proposal Maintenance and Operations (M&O) Costs

INSTRUCTIONS: Please fill in the cells shaded yellow in Table 2 to provide the estimated monthly hours per position for M&O services. Blue cells will populate automatically.

Please note: The M&O fees are fixed fees for providing the services in the RFP scope and in adherence with the stated performance standards in Attachment L. They are not tied to specific staffing levels. If the Contractor needs to utilize additional staff for any given month (e.g., due to temporary increase in incidents) or can reduce their staffing levels due to efficiencies in their processes for any given month, the Contractor shall still invoice their M&O fixed fee.

Table 1: M&O Cost Summary

Time Period	M&O Costs
Year 1 (6 months, 1/1/24-6/30/24)	\$ -
Year 2 (12 months)	\$ -
Year 3 (12 months)	\$ -
Year 4 (Optional, 12 months)	\$ -
Year 5 (Optional, 12 months)	\$ -
Year 6 (Optional, 12 months)	\$ -

Yearly M&O costs will automatically calculate based on summing monthly costs for each position, calculated in Table 2 below

Table 2: M&O Staff Costs

Position (auto-populated from Staff Rates sheet)	Monthly Hours per Position for Post Statewide Implementation Stabilization M&O	Monthly Hours per Position for Steady State M&O	Monthly Cost - Initial Term		Monthly Cost - Optional Years
			Stabilization M&O	Steady State M&O	
Example: Analyst	80	60	\$ 4,000.00	\$ 3,000.00	\$ 3,090.00
Executive Lead (Vital Position)			\$ -	\$ -	\$ -
Project Manager (Vital Position)			\$ -	\$ -	\$ -
Account Manager (Vital Position)			\$ -	\$ -	\$ -
M&O Manager (Vital Position)			\$ -	\$ -	\$ -
Lead Architect (Vital Position)			\$ -	\$ -	\$ -
Implementation Lead (Vital Position)			\$ -	\$ -	\$ -
Database Administrator (Vital Position)			\$ -	\$ -	\$ -
Data Migration Lead (Vital Position)			\$ -	\$ -	\$ -
OCM Lead (Vital Position)			\$ -	\$ -	\$ -
Training Lead (Vital Position)			\$ -	\$ -	\$ -
Testing Lead (Vital Position)			\$ -	\$ -	\$ -
Release Manager (Vital Position)			\$ -	\$ -	\$ -
(Respondent to fill in)			\$ -	\$ -	\$ -

Respondents will input the number of hours required of each position for post-statewide implementation stabilization and steady state M&O services

Monthly cost will then be calculated using the data entered in the corresponding 'Monthly Hours...' column, multiplied by the hourly cost for the position as entered on the "Staff Rates" tab



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659
Attachment D - Cost Proposal
Enhancements Costs

Respondent Name:

INSTRUCTIONS: Respondents do not need to enter any information on this sheet. For evaluation purposes, the hourly blended rate will be calculated based on the proposed rates for all the positions listed in the RFP. These blended rates will be multiplied by the State's estimated pool of hours by year to calculate the total estimated enhancement costs per year. Please note: the invoiced amounts will reflect the approved CR's cost methodology.

Section 1. Blended Rate Calculation (for Evaluation Purposes)

	Hourly Rate (Initial Term)	Hourly Rate (Optional Years)	Weighting for Blended Rate Calculation
Average Vital Positions Rate			25%
Average Non-Vital Positions Rate			75%
Blended Rate for Enhancements (for Evaluation Purposes)			

Section 2. Enhancement Costs Projection (for Evaluation Purposes)

Position	Year 1	Year 2	Year 3	Year 4 (Optional)	Year 5 (Optional)	Year 6 (Optional)
Estimated Enhancement Hours	6,700	10,000	10,000	10,000	10,000	10,000
Blended Rate (for evaluation purposes)						
Total Enhancement Costs						

Total Enhancement Costs will automatically calculate based on the estimated number of enhancement hours multiplied by the Blended Rate calculated above



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659
Attachment D - Cost Proposal
Other Costs

Respondent Name: 0

INSTRUCTIONS: Please fill in the yellow cells with any costs related to licenses / subscriptions / environments.

Item	Comments	Year 1 Cost (7/1/23-6/30/24)	Year 2 Cost (7/1/24-6/30/25)	Year 3 Cost (7/1/25-6/30/26)	Year 4 Cost (7/1/26-6/30/27) - Optional	Year 5 Cost (7/1/27-6/30/28) - Optional	Year 6 Cost (7/1/28-6/30/29) - Optional
TOTAL		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Respondents will input the name, comments, and yearly cost information for each license/subscription/environment cost item

Total licenses/subscriptions/environments costs for each year will automatically calculate based on the sum of all such costs for that year



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659
Attachment D - Cost Proposal
Options Costs

Respondent Name: 0

INSTRUCTIONS: There are four tables on this tab. Please note, data entered in this tab will not be used to calculate total contract values evaluated and scored as a portion of the cost score for this RFP.

Table 1: State Hosted Solution - Cost Reductions

Fill in the yellow shaded cells in Table 1 to provide the cost reduction that can be expected if the State moves forward with a State-hosted solution. For question 15.1 of Attachment F, Technical Proposal, provide a detailed explanation, without reference to specific dollar amounts, of the State hosted solution and the main drivers of the cost reduction.

	Cost Reduction	Year 1 Cost (7/1/23-6/30/24)	Year 2 Cost (7/1/24-6/30/25)	Year 3 Cost (7/1/25-6/30/26)	Year 4 Cost (7/1/26-6/30/27) - Optional	Year 5 Cost (7/1/27-6/30/28) - Optional	Year 6 Cost (7/1/28-6/30/29) - Optional	Total
DDI Pricing Impact		\$ -						\$ -
Monthly M&O Pricing Impact		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Licenses / Subscriptions / Environment		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total		\$ -						

Table 2: Alternative Helpdesk Services

Fill in yellow shaded cells in Table 2 to provide details for the cost of alternative helpdesk services options (e.g., higher tier of service, lower tier of service. For question 15.2 of Attachment F, Technical Proposal, provide a detailed explanation, without reference to specific dollar amounts, of each option.

Help Desk Offering	Change to Monthly M&O Fee

Respondents will input the cost reduction that can be expected for each cost category listed if the State chooses a State-hosted solution

Respondents will input alternative helpdesk service offerings and their associated change to the calculated monthly M&O fee [these may be positive or negative dollar amounts]

The total cost reduction the State could expect if it chose a State-hosted solution will automatically calculate based on cost reduction information inputted above



Cost Proposal (Attachment D)

State of Indiana, RFP 24-74659
Attachment D - Cost Proposal
Options Costs

Respondent Name:

Table 3: 12 Month Software Warranty

Fill in the yellow shaded cell in Table 3 to provide the additional M&O cost (if any) if the software warranty is increased from 6 months to 12 months.

Pricing impact for the increase from a 6 month to a 12 month warranty. If there is no additional cost for this change, please enter \$0.	
Explain if the amount is an increase over the monthly M&O fee or uses a different approach.	

Table 4: Clearinghouse Services

If your organization provides clearinghouse services either through your own organization or through a partner, fill in the yellow shaded cells to provide the unit costs for processing each claim through your clearinghouse. All staff, technology, support, and other costs must be included in the unit costs. Provide any additional cost-related information in the yellow space below the table. In your response to question 4.7 of Attachment F - Technical Proposal, please provide details of your clearinghouse offering.

Volume Tier	Unit Cost Per Claim

Additional cost related information, if relevant.

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Respondents who provide clearinghouse services will input unit costs for processing medical claims, associated volume tiers, and any associated cost information

Respondents will explain the pricing impact and relation to the calculated monthly M&O fee if there is an increase in the software warranty period from 6 to 12 months



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)	25 available points
4. Minority Business Enterprise Subcontractor Commitment	5 (1 bonus points are available, see Section 3.2.5)
5. Women Business Enterprise Subcontractor Commitment	5 (1 bonus points are available, see Section 3.2.5)
6. Indiana Veteran Owned Small Business Subcontractor Commitment	5 (1 bonus points are available, see Section 3.2.6)
7. Buy Indiana	5 available points
Total	100 (103 if bonus awarded)



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, MBE/WBE Form**

- Include sub-contractor letter of commitment

- **Goals for Proposal**

- 8% Minority Business Enterprise of the Total Bid Amount
- 11% Women's Business Enterprise of the Total Bid Amount



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

In accordance with IC 4-13-16.5 and 25 IAC 5, it has been determined that there is a reasonable expectation of Minority and/or Women Business Enterprise subcontracting opportunities on a contract awarded under this RFP. The MWBE Subcontractor Commitment form is **Attachment A**. The MWBE Subcontractor Commitment Form is to be submitted as a part of the Respondent's proposal. ~~In order for~~ the subcontractor commitment to result in evaluation points for the Respondent, the entity must be on the State of Indiana Certified M/W/IVOSB list at <https://www.in.gov/idoa/mwbe>.

If participation is met through use of respondents 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, Cost Summary. The MBE and/or WBE subcontractor amount and subcontractor percentage is based on the initial term of the contract for scoring purposes only. The subcontractor commitment shall apply to the life of the contract including any time after the initial term.

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

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

- Must be on the State of Indiana Certified M/W/IVOSB list at <https://www.in.gov/idoa/mwbe>, **on or before** the proposal due date
- Prime Contractor must include with their proposal the subcontractor's M/WBE Certification Letter provided by IDOA, to show current status of certification.
- Each firm may only serve as one classification – MBE, WBE, or IVOBS (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 (see 25 IAC 5-6-2(d))
- **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 services only in the industry area for which it is certified.
- 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(s) and/or WBE(s) 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 based on the initial term of the contract for scoring purposes only. The subcontractor commitment shall apply to the life of the contract including any time after the initial term.

The State may deny evaluation points if the letter(s) is/are 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.

Please carefully review the
information in this box



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. 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.
- **National Diversity Plans are NOT accepted.**



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, WBE, or IVOSB (see sections 1.21 and 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.



Minority and Women's Business Enterprises

RFP#: 24-74659

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:			

Minority and Women's Business Enterprises

■ **MBE/WBE Scoring Methodology as of August 2014:** - MBE/WBE 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:

MBE:

%	1%	2%	3%	4%	5%	6%	7%	8%
Pts.	.45	.9	1.35	1.8	3.125	3.75	4.375	5.0

WBE:

%	1%	2%	3%	4%	5%	6%	7%	8%	9%	10%	11%
Pts.	0.45	0.9	1.35	1.8	2.25	2.7	3.15	3.6	4.05	4.5	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 ("exceeds" defined as a commitment percentage that is equal to or greater than 9% before rounding) for the MBE participation or equal to or greater than 12% before rounding) for the WBE participation will receive 6 points (5 points plus 1 bonus point). In case of a tie both firms will receive 6 points.



Indiana Veteran Owned Small Business

- **Contact Information**

- Phone: 317-232-3061
- E-mail: Indianaveteranspreference@idoa.in.gov
- Web: www.in.gov/idoa/2863.htm

- **Complete Attachment A1, IVOSB Form**

- Include subcontractor letters of commitment

- **Goals for Proposal**

- 3% Veteran Owned Small Business the Total Bid Amount



**ATTACHMENT A1
INDIANA VETERAN OWNED SMALL BUSINESS RFP SUBCONTRACTOR
COMMITMENT FORM¹**

If participation is met through use of respondents 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, Cost Summary. The IVOSB subcontractor amount and subcontractor percentage is based on the initial term of the contract for scoring purposes only. However, the subcontractor commitment shall apply to the life of the contract including any time after the initial term. In order for the subcontractor commitment to result in evaluation points for the Respondent, the entity must be on the State of Indiana Certified M/W/IVOSB list at <https://www.in.gov/idoa/mwbe> or listed on the Federal Center for Veterans Business Enterprise (VETBIZ) at <https://www.vetbiz.va.gov/vip/> under INDIANA **on or before** the proposal due date.

If the Respondent to the solicitation is an IVOSB certified entity, the letter confirming same should be submitted with their response. Therefore, the Respondent has the responsibility to alert IDOA of their certification. The IVOSB Respondent will receive the total points for the IVOSB evaluation criteria per section 3.2.7. Additional ISVOB subcontractors must be included if the IVOSB Respondent is seeking the additional bonus point.

The IVOSB respondent must list their **company contact information only** on the IVOSB Subcontractor Commitment Form.

Failure to address these goals may impact the evaluation of your Proposal. The Department will verify all information included on the IVOSB Subcontractor Commitment Form.

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

- Must be listed on Federal Center for Veterans Business Enterprise VETBIZ at <https://www.vetbiz.va.gov/vip/> under INDIANA, or listed at State of Indiana Certified M/W/IVOSB list at <https://www.in.gov/idoa/mwbe>, **on or before** the proposal due date.
- Prime Contractor must include with their proposal the subcontractor’s veteran business Certification Letter provided by either IDOA or Federal Govt. VETBIZ at <https://www.vetbiz.va.gov/vip/>, to show current status of certification.
- Each firm may only serve as one classification – MBE, WBE (see Section 1.21) or IVOSB
- IVOSB must have a Bidder ID (see [Section 2.3.8 - Department of Administration, Procurement Division](#)).
- A Prime Contractor who is an IVOSB **can** count their own workforce or companies to meet this requirement, (see IAC 25-9-4-1 (c))
- **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 services only in the industry area for which it is certified as listed in the VETBIZ federal registry, at <https://www.vetbiz.va.gov/vip/> under INDIANA or at State of Indiana Certified M/W/IVOSB list at <https://www.in.gov/idoa/mwbe>. Must be used to provide the goods or services specific to the contract.

INDIANA VETERAN OWNED SMALL BUSINESS RFP SUBCONTRACTOR LETTER OF COMMITMENT

¹ The Indiana Veteran Business Program is governed by IC 5-22-14 and 25 IAC 9.

A signed letter(s), on company letterhead, from the IVOSB(s) must accompany the IVOSB Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the IVOSB of its subcontract amount, a description

Please carefully review the
information in this box



Indiana Veteran Owned Small Business

Prime contractors should note the following:

- Pursuant to 25 IAC 9-4-1(c), a Prime Contractor who is an IVOSB can use their own workforce to count toward the goal.
- IVOSB must have a Bidder ID
- Prime contractor and/or subcontractors' Certification Letter(s), provided by IDOA or Federal Center for Veterans Business Enterprise ([VA OSDBU](#)), must accompany the proposal to show current status of certification.
- Each firm may only serve as one classification – MBE, WBE, or IVOSB (see section 1.22 of the Scope of Work – Attachment K).



Indiana Veteran Owned Small Business

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

- Must be listed on [VA OSDBU](#) registry or listed on the IDOA Directory of Certified Firms, on or before the proposal due date.
- 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.



Indiana Veteran Owned Small Business

RFP#: 24-74659

TOTAL BID AMOUNT:

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:



Indiana Veteran Owned Small Business

- **New Process** - IVOSB scoring is conducted based on 5 points plus a possible 1 bonus point scale
IVOSB: Possible 5 points + 1 bonus point

- **Professional Services Scoring Methodology:**

- The points will be awarded on the following schedule:

%	0%	0.6%	1.2%	1.8%	2.4%	3%
Pts.	-1	1	2	3	4	5

- Fractional points will be awarded based upon a graduated scale between whole points. (e.g. a 0.3% commitment will receive .5 points and a 1.5% commitment will receive 2.5 points)
 - Submissions of 0% participation will result in a deduction of 1 point in each category
 - The highest submission which exceeds the goal will receive 6 points (5 points plus 1 bonus point). In case of a tie both firms will receive 6 points.



IDO A Subcontractor Scoring

RFP MBE/WBE/IVOSB Scoring Example

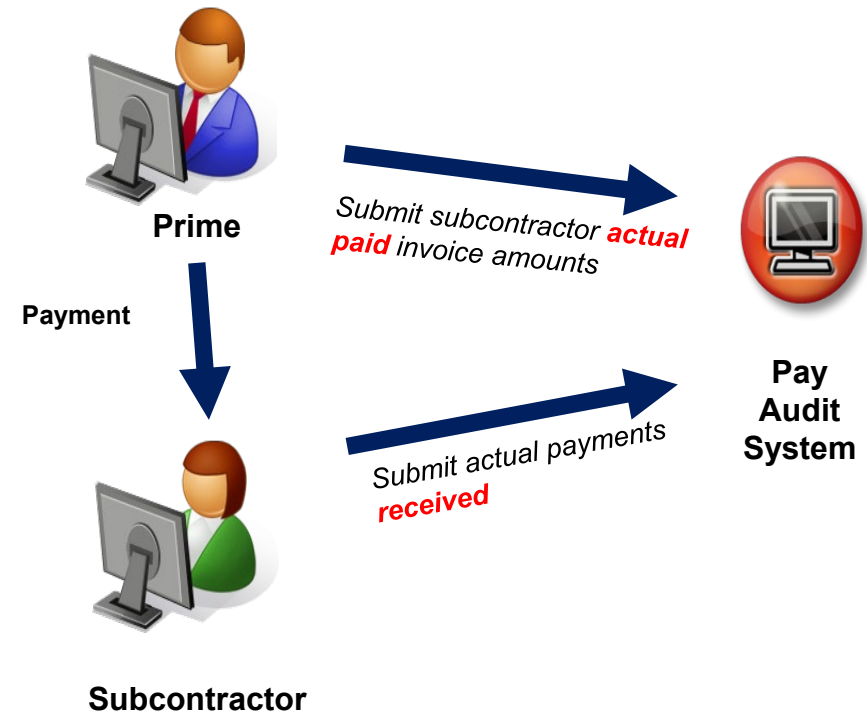
Bidder	MBE %	Pts.	WBE %	Pts.	IVOSB %	Pts.	Total Pts.
Bidder 1	12.0%	5.0	12.0%	6.0	3.5%	6.0	17.00
Bidder 2	6.0%	3.75	5.0%	2.25	1.8%	3.0	9.00
Bidder 3	8.0%	5.0	11.0%	5.0	3.0%	5.0	15.00
Bidder 4	16.0%	6.0	0.2%	0.0	0.6%	1.0	7.00
Bidder 5	0.0%	-1.0	0.0%	-1.0	0.0%	-1.0	-3.00



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



Proposal Preparation

■ Buy Indiana

- Respondent's Buy Indiana status must be finalized by proposal due date.
- It is the Respondent's responsibility to confirm its Buy Indiana status for this portion of the process.
- Respondent must clearly indicate which preference(s) they intend to claim in **Attachment J**.
- Respondents that wish to claim the Buy Indiana preference must have an email confirmation of their Buy Indiana status provided by buyindianainvest@idoa.in.gov included in the proposal response. The email confirmation must have been provided from within one year prior to the proposal due date.



Proposal Preparation

Indiana Economic Impact Form (Attachment C)

- Please complete the template provided for the IEI filling out information on tab Attachment C and tab FTE Details
- Form must be signed on tab Attachment C, electronic signatures are acceptable
- Complete only the yellow shaded cells on tab FTE Details
 - ❑ Definitions of FTE (Full-Time Equivalent)

Examples:

5 employees x 48 months (48 months working solely on this project) x 1 (time spent solely on this project) = 240 months / 48 months (length of contract) = 5 FTEs

3 employees x 48 months x .5 (splitting time equally between 2 projects) = 72 months / 48 months = 1.5 FTEs

2 employees x 12 months (12 months dedicated solely to this project) x 1 (time spent solely on this project) = 24 months / 48 months = .5 FTEs



Submission Requirements

All submissions must be made through a *two-part* process as described in RFP Sections 2.1.

■ Part One: Procurement Submission Form

- Form is available via the [Procurement Submission Form](#) link on the [Current Business Opportunities](#) page.
- All fields must be completed, including uploading the Executive Summary and Attestation Form
- The form must be submitted by the Part One due date and time listed in Section 1.24. Failure to submit the forms or submission after the due date and time will result in disqualification.

■ Part Two: Receipt of Proposals on Flash Drives

- Proposal files must be mailed to the address listed in Section 1.8.
- The proposal must be received by the Part Two due date and time listed in Section 1.24. Failure to submit the flash drive by the due date and time will result in disqualification.

■ You must be a registered bidder to submit a proposal.

- Please refer to the [Bidder Registration](#) tutorial page for instructions about creating or updating your Bidder Profile.

It is your responsibility to ensure that all required documents and forms are submitted prior to the due dates. Failure to complete or submit required documents and forms may result in disqualification or loss of points.



Optional Submission Forms/Documents

Due Date	Document/Form
March 24, 2023	Pre-Proposal Networking Opportunity (Attachment I)
March 24, 2023	Questions and Answers Form (Attachment G)
April 3, 2023	Letter of Intent to Respond Form (Attachment K)

Submission of these documents is optional and does not impact your ability to submit a proposal.



Required Submission Forms/Documents

Due Date	Document/Form
April 17, 2023 – 3 p.m. ET	Online Submission Form (Part One) <ul style="list-style-type: none"> • Executive Summary • Attestation Form (Attachment J)
April 20, 2023 – 4:30 p.m. ET	MWBE Subcontractor Commitment Form (Attachment A) <ul style="list-style-type: none"> • Letter(s) of Commitment • Certification Documentation
	IVOSB Subcontractor Commitment Form (Attachment A1) <ul style="list-style-type: none"> • Letter(s) of Commitment • Certification Documentation
	Indiana Economic Impact Form (Attachment C)
	Cost Proposal Template (Attachment D)
	Business Proposal Template (Attachment E)
	Technical Proposal Template (Attachment F)
April 20, 2023 – 3:00 p.m. ET	Reference Check Forms (Attachment H) – Must be completed by the reference and emailed directly to the State.

Use the templates provided for all responses and do not alter any templates.

Responses must be submitted per the RFP instructions. See RFP Sections 1.8 and 2.1 for additional details. Late submissions, emailed or hand-delivered submissions will not be accepted.



Questions

Verbal responses provided today are non-binding. For binding responses please submit a question/inquiry through the Q&A matrix (Attachment G).

All questions/inquiries should be submitted using the Q&A Matrix (Attachment G) as outlined in Section 1.7 of the RFP main document.

REMINDER (OPTIONAL): If interested, send a Pre-proposal Network Opportunities Form (Attachment I) via email at rfp@idoa.in.gov no later than 3:00 PM ET on March 24, 2023.



Thank You!

SYED MOHAMMAD

Smohammad@idoa.IN.gov

Division Of Supplier Diversity

mwbecompliance@idoa.in.gov

www.in.gov/idoa/mwbe/payaudit.htm

