

REQUEST FOR PROPOSAL 24-76754

**BENEFIT CONSULTING SERVICES**

INDIANA DEPARTMENT OF ADMINISTRATION

ON BEHALF OF

STATE PERSONNEL DEPARTMENT (SPD)

ARTHUR L. SAMPLE IV  
IDOA/PROCUREMENT DIVISION



# Agenda

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# General Information

- 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](mailto:rfp@idoa.in.gov) no later than **3:00 PM EST on January 5, 2024**. This form is optional.
- Potential Respondents to the solicitation are encouraged to submit any questions pertaining to the RFP 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 EST on January 5, 2024**.
- Submission process is due no later than **3:00 PM EST on January 30, 2024**.



# Purpose of the RFP

The purpose of this solicitation is to select a respondent that can satisfy the State's need for Benefit Consulting Services. It is the intent of INSPD to contract with one or more respondents that provides quality consulting and/or auditing services for the State of Indiana Employee Benefit Plans..



# Term of Contract

- The term of the contract shall be for a period of (5) years from the date of contract execution.
- There may be (3) one-year renewals for a total of (8) years at the State's option.

# Key Dates

| Activity  | Date  |
|---|---|
| Issue of solicitation   | December 22, 2023                           |
| Pre-proposal Network Opportunities Form   | January 5, 2024                             |
| Deadline to Submit Written Questions  | January 5, 2024<br>by 3:00 PM Eastern Time  |
| Response to Written Questions/Amendments  | January 12, 2024                            |
| Submission Due Date/Time  | January 30, 2024<br>by 3:00 PM Eastern Time |
| Submission of Reference Check Forms to State  | January 30, 2024<br>by 3:00 PM Eastern Time |
| <b><i>The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.</i></b> |   |
| Proposal Evaluation   | TBD   |
| Proposal Discussions/Clarifications (if necessary)  | TBD   |
| Oral Presentations (if necessary)   | TBD   |
| Best and Final Offers (if necessary)  | TBD   |
| Award Recommendation  | TBD   |



# Proposal Preparation

## Executive Summary

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 status regarding Secretary of State registration
- You may include additional “cover letter” information within the Executive Summary if desired.



# 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



# Proposal Preparation

## 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 35 points. The normalization formula is as follows:

$$\text{Respondent's Cost Score} = (\text{Lowest Cost Proposal} / \text{Total Cost of Proposal}) \times 35$$

# Proposal Preparation

## Business Proposal (Attachment E)

### ■ Company Financial Information (Section 2.3.4)

- Respondents must provide documents to demonstrate financial stability including, for example, the 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, Respondents must explain why and include an income statement and balance sheet for each of the two (2) most recently completed fiscal years.
- If the documents provided by the Respondent are from a parent or holding company, Respondents must explain the business relationship between the entities and demonstrate the financial stability of the entity which is directly responding to this RFP.

### ■ Contract Terms (Section 2.3.6)

- Respondents should review the sample State contract (Attachment B) and note exceptions to State non-mandatory clauses in Attachment E - Business Proposal. Mandatory clauses are non-negotiable.

### ■ References (Section 2.3.7)

- Respondents must have at least two (2) references for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. Respondents must ask each reference to complete Attachment H - Reference Check Form and email it directly to IDOA ([idoareferences@idoa.in.gov](mailto:idoareferences@idoa.in.gov)) by 3:00 PM EST April 25, 2023.



# Proposal Preparation

## Technical Proposal (Attachment F)

- Respondents should use Attachment F to complete their Technical Proposal. Requirements in the Scope of Work (SOW) should be reviewed carefully as they should inform answers to the questions in Attachment F. Use the yellow shaded fields to answer the questions in Attachment F.
  - Respondents shall describe relevant experience and explain how they propose to perform the work.
  - Insert text in the provided yellow fields. Yellow fields will expand to accommodate content.
  - Make every attempt to preserve the original format of Attachment F.
- Where appropriate, supporting documentation (e.g. diagrams, certificates, graphics, or other exhibits) may be submitted as an attachment and referenced within the relevant answer field.

# 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 be listed on IDOA's Buy Indiana Certification List.



# Proposal Preparation

## ■ Confidential Information (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 **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**



# Evaluation Criteria

| Criteria  | Points   |
|---|--|
| Adherence to Mandatory Requirements                             | Pass/Fail  |
| Management Assessment/Quality (Business and Technical Proposal) | 40 points  |
| Cost (Cost Proposal)  | 40 points  |
| Buy Indiana   | 5 points   |
| Minority Business Participation (MBE)                           | 5 points (1 bonus points are available, see Section 3.2.5) |
| Women Business Participation (WBE)                              | 5 points (1 bonus points are available, see Section 3.2.5) |
| Indiana Veteran Owned Small Business Participation (IVOSB)      | 5 points (1 bonus points are available, see Section 3.2.6) |
| Total   | 100 points (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](mailto:mwbecompliance@idoa.in.gov)
- Web: [www.in.gov/idoa/mwbe](http://www.in.gov/idoa/mwbe)

## Complete Attachment A, MWBE Form

- Include sub-contractor letter of commitment

## Goals for Proposal

- 8% Minority Business Enterprise
- 11% Women's Business Enterprise



Please carefully review the information in this box



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 "Evaluated 4 Year Total Cost" should match the amount entered in the **Attachment D**, Cost Proposal Template Tab Cost Summary cell (C7). 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 IVOB (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

# 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.



# 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

## STATE OF INDIANA MBE/WBE SUBCONTRACTOR COMMITMENT FORM

|   |  |  |  |
|---|--|--|--|
| RFP#:   |  |  |  |
|   |  |  |  |
| 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: <b>Total \$ Subcontractor Commitment</b>               |  | <b>Describe service/product to be provided and <u>how this is a Valuable Scope Contribution of the Contract.</u></b><br><br><b>A business function that <u>directly</u> supports the scope of work as defined in the RFP Section 1.4</b> |  |
| Sub-Contract Percentage of Total Bid: <b>% of Total Bid Amount</b>          |  |  |  |
|   |  |  |  |
| Provide approximate dates when Sub-Contractor will perform on this project: |  |  |  |



# Minority and Women's Business Enterprises

## ■ Scoring Process - 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

## ■ MBE 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 ("exceeds" defined as a commitment percentage that is equal to or greater than 9% before rounding) in each category will receive 6 points (5 points plus 1 bonus point). In case of a tie both firms will receive 6 points.



# Minority and Women's Business Enterprises

## ■ WBE Professional Services Scoring Methodology:

- The points will be awarded on the following schedule:

| %    | 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 WBE participation the Respondent will receive 0 points.
- Submissions of 0% participation will result in a deduction of 1 point.
- The highest submission which exceeds the goal ("exceeds" defined as a commitment percentage that is equal to or greater than 12% before rounding) in each category 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](mailto:Indianaveteranspreference@idoa.in.gov)
- Web: [www.in.gov/idoa/2862.htm](http://www.in.gov/idoa/2862.htm)

## Complete Attachment A1, IVOSB Form

- Include sub-contractor letters of commitment

## Goals for Proposal

- 3% Veteran Owned Small Business



Please carefully review the information in this box



ATTACHMENT A1  
INDIANA VETERAN OWNED SMALL BUSINESS RFP SUBCONTRACTOR  
COMMITMENT FORM<sup>1</sup>

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 "Evaluated 4 Year Total Cost" should match the amount entered in the Attachment D, Cost Proposal Template Tab Cost Summary cell (C7). 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>.

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 IVOSB 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

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

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

# 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 (see section 2.3.8 - Department of Administration, Procurement Division).
- Prime contractor and/or subcontractors' Certification Letter(s), provided by IDOA or Federal Center for Veterans Business Enterprise ([VA OSD BU](#)), 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).



# 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

## STATE OF INDIANA IVOSB SUBCONTRACTOR COMMITMENT FORM

RFP#

TOTAL BID AMOUNT:

Company Name:

Address:

Sub-Contract Amount: Total \$ Subcontractor  
Commitment

Sub-Contract Percentage of Total Bid:  
% of Total Bid Amount

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

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:

A business function that **directly** supports the scope of  
work as defined in the RFP Section 1.4



# 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.



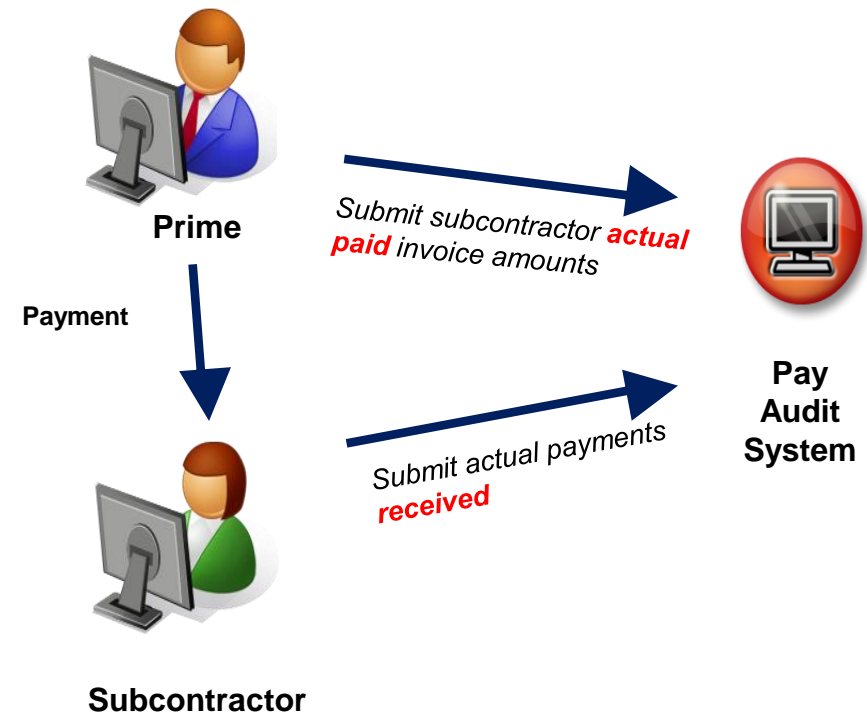
# IDO A Subcontractor Scoring

## RFP MBE/WBE/IVOSB Scoring Example

| Bidder   | MBE % | Pts. | WBE % | Pts. | IVOSB % | Pts. | Total Pts. |
|----------|-------|------|-------|------|---------|------|------------|
| Bidder 1 | 12.0% | 5.0  | 13.0% | 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

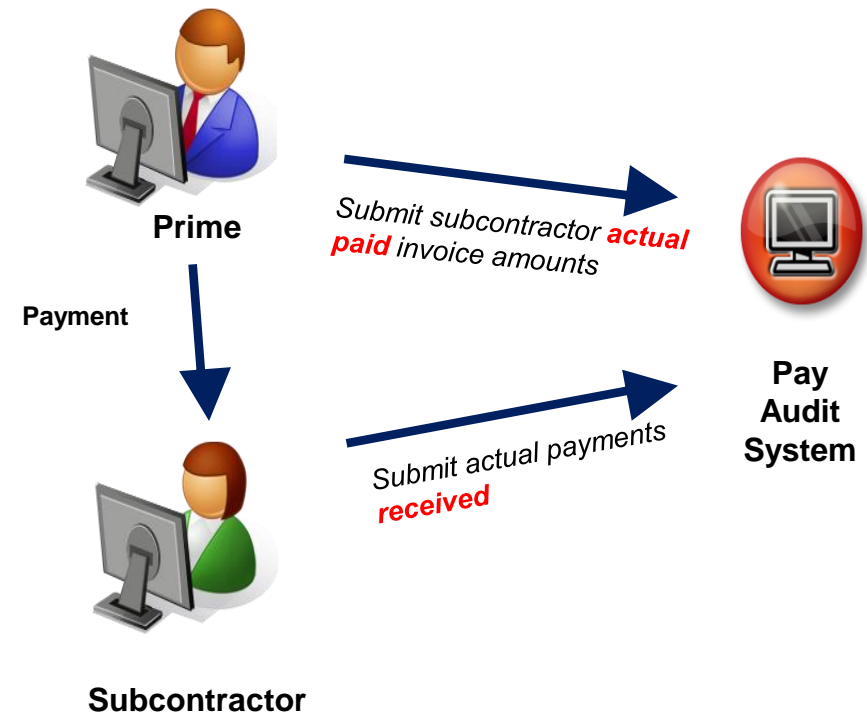
- Based on contract terms payments should be reported monthly or quarterly.
- Payments shall be reported using the format determined by the Division of Supplier Diversity.
- Reports must be received on or before the 10th of each month or quarter via email to the Division.
- **Questions?** Contact Division of Supplier Diversity:
  - [mwbecompliance@idoa.in.gov](mailto:mwbecompliance@idoa.in.gov)
  - [www.in.gov/idoa/mwbe/payaudit.htm](http://www.in.gov/idoa/mwbe/payaudit.htm)



# 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](mailto:mwbecompliance@idoa.in.gov)
  - [www.in.gov/idoa/mwbe/payaudit.htm](http://www.in.gov/idoa/mwbe/payaudit.htm)



# Required Forms / Documents

## Attachment A - M/WBE Participation Plan

- M/WBE Certification Letter from IDOA
- Signed Commitment Letter from M/WBE
  - *The dollar amount being subcontracted to them*
  - *The subcontract amount reflected as a percentage of the total contract*
  - *A description of products and/or services to be provided on this contract*
  - *Approximate date the subcontractor will perform work on this contract*
- Form must be completed / signed even if there is 0% participation

## Attachment A1 - Indiana Veterans' Participation Plan

- Certification Letter provided by IDOA or VA OSDBU
- Signed Commitment Letter from IVOSB (similar to M/WBE)
- Form must be completed / signed even if there is 0% participation



# Required Forms / Documents

- Attachment C - Indiana Economic Impact Form
  - Complete / Submit in Excel
  - Signature Required
- Attachment D - Cost Proposal
- Attachment E - Business Proposal
- Attachment F - Technical Proposal
- Attachment H - Reference Check Form (2)
  - *Must be emailed directly to IDOA from the Reference NOT the Respondent*
- Attachment J - Attestation Form
- Buy Indiana - must be listed on IDOA's Buy Indiana Certification List (if applicable)

**Failure to submit any of the required forms/documents puts your proposal at risk of not being evaluated and/or loss of points.**



# Submission Requirements

All submissions must be made through a *two-part* process as described in RFP Sections 1.8 and 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.**



# 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](http://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>**
- E. RFP posting and updates:**  
Go to **<https://www.in.gov/idoa/procurement/current-business-opportunities/>**  
Scroll through table until you find desired RFP number on left-hand side and click the link.



# Questions

All questions must be submitted via email to [rfp@idoa.in.gov](mailto:rfp@idoa.in.gov) no later than 3:00 PM EST on January 5, 2024, using Attachment G - Q&A Template.

**REMINDER:** Email your contact info via Attachment I – Pre-proposal Network Opportunities Form to [rfp@idoa.in.gov](mailto:rfp@idoa.in.gov) no later than 3:00 PM EST on January 5, 2024, to be included on the virtual sign in sheet.



# Thank You

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**ASAMPLE@IDOA.IN.GOV**

