STATE OF INDIANA

Request for Proposal/Partnership 27-88573

INDIANA DEPARTMENT OF ADMINISTRATION

On Behalf Of

Indiana State Personnel Department

Solicitation For:

TPA Services for the State Employee Health Plans

Submission Due Date and Time:

December 17, 2026, by 3:00PM ET

Robert Cohen, Category Director – Major Procurements
rcohen@idoa.in.gov
Indiana Department of Administration
Procurement Division
402 W. Washington St., Room W468
Indianapolis, Indiana 46204

Table of Contents

Section One General Information and Requested Products/Services 4

1.1 Introduction 4

1.2 Definitions and Abbreviations 4

1.3 Statement of Work 6

1.4 Solicitation Outline 6

1.5 Pre-Proposal Conference 7

1.6 Question/Inquiry Process 8

1.7 Due Date for Proposals 8

1.8 Modification or Withdrawal of Offers 9

1.9 Procurement Protest Policy 9

1.10 Proposal Clarifications 9

1.11 Best and Final Offer (BAFO) 10

1.12 Reference Site Visits 10

1.13 Type and Term of Contract 10

1.14 Confidential Information 10

1.15 Taxes 11

1.16 Procurement Division Registration 11

1.17 Secretary of State Registration 11

1.18 Compliance Certification 12

1.19 Conflict of Interest 12

1.20 Equal Opportunity Commitment 12

1.21 Reserved 13

1.22 Americans with Disabilities Act 13

1.23 Summary of Milestones 13

Section Two Proposal Preparation Instructions 14

2.1 General 14

2.2 Executive Summary 14

2.2.1 Summary of Ability and Desire to Supply the Required Products or Services 14

2.2.2 Respondent Notification 14

2.2.3 Other Information 14

2.3 Business Proposal 15

2.4 Technical Proposal 15
2.5 Cost Proposal 15
2.6 Attestation Form 16
Section Three Proposal Evaluation 16
3.1 Proposal Evaluation Procedure 16
3.2 Evaluation Criteria 16
3.2.1 Adherence to Requirements – Pass/Fail 18
3.2.2 Management Assessment/Quality 18
3.2.3 Price 18
3.2.4 Buy Indiana Initiative – 5 points 19
3.2.5 Reserved 19
3.2.6 Reserved 19
3.2.8 Reserved 19

Section One
General Information and Requested Products/Services

1.1 Introduction

In accordance with applicable Indiana Code provisions, Rules and Policies, the Indiana Department of Administration (IDOA), acting on behalf of the Indiana State Personnel Department (INSPD), requires TPA Services for the State Employee Health Plans. It is the intent of IDOA to solicit responses to this solicitation in accordance with the statement of work, proposal preparation section, and specifications contained in this document. This solicitation is being posted to the IDOA Bidding Opportunities website, at https://www.in.gov/idoa/procurement/current-business-opportunities/ for downloading. Neither this solicitation nor any response (proposal) submitted hereto are to be construed as a legal offer.

1.2 Definitions and Abbreviations

The following are explanations of terms and abbreviations appearing throughout this solicitation. Other special terms may be used in the solicitation, but they are more localized and defined where they appear, rather than in the following list.

Award Recommendation	IDOA's summary, typically in letter format, of the solicitation and suggestion on respondent selected for the purposes of beginning contract negotiations.
BAFO	Best and Final Offer is an opportunity for short-listed respondents to propose an improved cost for final score consideration.
Contract Award	The acceptance of IDOA's Award Recommendation by the agency being supported in conjunction with the public posting of the Award Recommendation.
Full Time Equivalent (FTE)	The State defines FTE as a measurement of an employee's productivity when executing the scope of work in this solicitation for a specific project or contract. An FTE of 1 would mean that there is one worker fully engaged on a project. If there are two employees, each spending 1/2 of their working time on a project, that would also equal 1 FTE.
IAC	Indiana Administrative Code
IC	Indiana Code
Installation	The delivery and physical setup of products or services requested in this solicitation.

IV&V	Independent Verification & Validation
Other Governmental Body	An agency, a board, a branch, a bureau, a commission, a council, a department, an institution, an office, or another establishment of any of the following: 1) The judicial branch 2) The legislative branch 3) A political subdivision as defined in IC 5-22-2-22 and IC 36-1-2-13 (includes school corporations, municipal corporations, Legislative body, Taxing district, Town, Township, and Unit) 4) A State educational institution
Prime Contractor	Refers to the entity responding to the solicitation.
Products	Tangible goods or manufactured items as specified in this solicitation.
Proposal	An offer as defined in IC 5-22-2-17.
Respondent	An offeror as defined in IC 5-22-2-18; and any entity or person who does business with the State and is registered as same. The State will not consider a proposal responsive if two or more offerors submit a joint or combined proposal. One entity or individual must be clearly identified as the company who will be ultimately responsible for performance of the contract.
Services	Work to be performed as specified in this solicitation.
State	The State of Indiana
State Agency	As defined in IC 4-13-1, "State Agency" means an authority, board, branch, commission, committee, department, division, or other instrumentality of the executive, including the administrative, department of State government.
Subcontractor	Refers to the entity entering into a contract with the Prime Contractor for a portion of the scope of the solicitation.
Total Bid Amount	The amount that the Respondent proposes on **Attachment D** that represents their total, all-inclusive price.
VSC (Valuable Scope Contribution)	The benefit the proposed certified subcontractors(s) must provide to the project set forth in the solicitation.

1.3 Statement of Work

Please see **Attachment K** – Statement of Work

Statewide Information Technology Policies, Procedures, and Standards

The State has robust and comprehensive security standards that permeate all levels of the organization. The Indiana Office of Technology (IOT) has been tasked with establishing and maintaining these security standards. The security standards include assessing security risks, developing, and implementing effective security procedures, and monitoring the effectiveness of those procedures. If the proposed solution involves information technology-related products or services, all such products or services are to be compatible with any of the technology standards found in the Statewide IT Policies, Procedures, & Standards (https://www.in.gov/iot/policies-procedures-and-standards/) that are applicable, including the assistive technology standard. The Contractor will be required to sign a Non-Disclosure Agreement (NDA) to access the more sensitive standards and policies. The Contractor should review the Statewide IT Policies, Procedures, & Standards and ensure their proposed solution meets all standards therein.

1.4 Solicitation Outline

The outline of this solicitation document is described below:

Section	Description
Section One – General Information and Requested Products or Services	This section provides an overview of the solicitation, general timelines for the process, and a summary of the products/services being solicited by the State/Agency via this solicitation
Section Two – Proposal Preparation Instruction	This section provides instructions on the format and content of the solicitation including an Executive Summary, Business Proposal, Technical Proposal, and a Cost Proposal
Section Three – Proposal Evaluation Criteria	This section discusses the evaluation criteria to be used to evaluate Respondents' proposals
Attachment A	Reserved
Attachment B	Sample Contract
Attachment B1	IOT IaaS
Attachment B2	IOT PaaS
Attachment B3	IOT SaaS

Attachment D	Cost Proposal Template
Attachment E	Business Proposal Template
Attachment F	Technical Proposal Template
Attachment G	Q&A Template
Attachment H	Reference Check Form
Attachment I	Pre-Proposal Network Opportunities Form
Attachment J	Attestation Form
Attachment K	Statement of Work (Exhibit A)
Attachment L	AI Technical Proposal Questions
Attachment M	Infrastructure Overview
Attachment N	File Exchanges with Medical TPA and Subcontractors
Attachment O	SOI Member Census Sept 2026

1.5 Pre-Proposal Conference

A pre-proposal conference will be held at the date, time and location specified in Section 1.23. At this conference, potential respondents may ask questions about the solicitation and the solicitation process. Respondents are reminded that no answers issued verbally at the conference are binding on the State and any information provided at the conference, unless it is later issued in writing, also is not binding on the State.

The pre-proposal conference provides an opportunity for potential Prime Contractors and potential Subcontractors to connect. The State strongly encourages potential Prime Contractors and potential Subcontractors to complete and submit **Attachment I** directly to MPcategory@idoa.in.govno later than the time and date outlined in Section 1.23. Compiled company contact information will be posted to the solicitation website to allow networking to take place among the vendor community. Though **Attachment I** is not required, the State encourages its use.

The pre-proposal conference will be held both “in-person” and “virtually.” The virtual option will have a link posted on the Current Business Opportunities webpage at the following link: https://www.in.gov/idoa/procurement/current-business-opportunities/. Details of the pre-proposal conference will be posted no later than 48 hours before the published date outlined in Section 1.23 of this document. The in-person option will be held at the Indiana Government Center- South located at 402 W Washington St, Indianapolis, IN 46204. The specific conference room will be near the auditorium, and members of IDOA will be available to help direct you.

1.6 Question/Inquiry Process

All questions/inquiries regarding this solicitation must be submitted by the date and time outlined in Section 1.23. Questions/Inquiries may be submitted in **Attachment G**, Q&A Template, via email to MPcategory@idoa.in.gov and must be received by the time and date indicated in Section 1.23.

The subject line of the email submissions must clearly state the following:
"RFP 27-88573 Questions/Inquiries – [*INSERT COMPANY NAME*]".

Following the question/inquiry due date, Procurement Division personnel will compile a list of the questions/inquiries submitted by all Respondents, redacting the name of the company who submitted the question. The responses will be posted to the IDOA website according to the timetable established in Section 1.23.

Only answers posted on the IDOA website will be considered binding and valid by the State. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employee.

If it becomes necessary to revise any part of this solicitation, or if additional information is necessary for a clearer interpretation of provisions of this solicitation prior to the due date for proposals, an Addendum will be posted on the IDOA website. If such Addenda issuance is necessary, the Procurement Division may extend the due date and time of proposals to accommodate such additional information requirements, if required.

1.7 Due Date for Proposals

All proposals must be received through the Supplier Portal at the link below by the Procurement Division no later than the date and time outlined in Section 1.23, Summary of Milestones. The proposal will be considered the official response in evaluating responses for scoring and protest resolution and may be posted on the IDOA website, https://www.in.gov/idoa/procurement/award-recommendations/ if recommended for selection. The proposal must follow the format indicated in Section Two of this document. No other method of submission will be accepted. Unnecessarily elaborate brochures or other presentations, beyond those necessary to present a complete and effective proposal, are not desired. The State accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.

Multi-Factor Authentication:
https://www.in.gov/iot/customer-service/myshareingov/multi-factor-authentication/

Supplier Portal:
https://www.in.gov/idoa/procurement/supplier-resource-center/requirements-to-do-business-with-the-state/bidder-profile-registration/

Instructions on how to submit an electronic bid:
https://www.in.gov/idoa/procurement/supplier-resource-center/requirements-to-do-business-with-the-state/bidder-profile-registration/manage-my-bidder-profile/submitting-a-bid/

1.8 Modification or Withdrawal of Offers[1]

Responses may be modified by Respondents until the time and date the response is due. The Respondent's authorized representative may withdraw the proposal prior to the due date by sending notice to the point of contact listed on the first page of this document.

1.9 Procurement Protest Policy

The State's procurement protest policy can be found at https://www.in.gov/idoa/procurement/files/OMBCircular1-3_IDOAProtestPolicy_2025.pdf Per the policy, there are two periods of protest allowable for the solicitation:

- Specifications Protest - written letter of protest regarding inadequate, unduly restrictive, or ambiguous requirements or specifications must be received by IDOA by the close of business not less than ten (10) business days (as defined by the State work calendar) prior to the proposal due date.

- Award Recommendation Letter Protest - written letter of protest regarding the procurement methods and/or procedures used during the procurement process must be received by IDOA by the close of business within five (5) business days (as defined by the State work calendar) after the date of the Award Recommendation Letter.

1.10 Proposal Clarifications

The State may request clarifications, in writing, on proposals submitted. These clarifications could include, but are not limited to, requests for additional information, or requests for Cost or Technical proposal revision. Additionally, in conducting clarifications, the State may use information derived from proposals submitted by competing Respondents only if the identity of the Respondent providing the information is not disclosed to others. The State will provide equivalent information to all Respondents which have been chosen for clarifications.

A sample contract is provided in **Attachment B**. Any requested changes to the sample contract must be submitted with your response. The State may reject any of these requested changes. It is the State's expectation that any material elements of the contract will be substantially finalized prior to contract award.

[1] Please note if the State elects to cancel the solicitation, all submitted responses would remain confidential, until the replacement solicitation is concluded, and an Award Recommendation made.

1.11 Best and Final Offer (BAFO)

Each proposal should contain the Respondents' best terms from a price and technical perspective.

The State may request Best and Final offers from those Respondents determined by the State to be reasonably viable for contract award. However, the State reserves the right to award a contract based on initial proposals received.

Following evaluation of the Best and Final offers, the State may select for final contract negotiations/execution the offer(s) that are most advantageous to the State.

1.12 Reference Site Visits

The State may request a site visit to a Respondent's working support center to aid in the evaluation of the Respondent's proposal. Site visits, if required, will be discussed in the technical proposal.

1.13 Type and Term of Contract

The State intends to sign a contract with one or more Respondent(s) to fulfill the requirements in this solicitation.

The term of the contract shall be for a period of one (1) year from the date of contract execution. There may be four (4) one-year renewals for a total of four (4) years at the State's option.

1.14 Confidential Information

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 *et seq*. The responses are deemed to be "public records" unless a specific provision of IC 5-14-3 protects it from disclosure. Respondents claiming a statutory exception to the APRA **must indicate so per Attachment J, Section 5.0** which specific provision applies to which specific part of the response.

Please note citing "Confidential" on an entire section is not sufficient or acceptable.

The Public Access Counselor (PAC) provides guidance on APRA. Respondents are encouraged to read guidance from the PAC on this topic as this is the guidance IDOA follows:

- 18-INF-06; Redaction of Public Procurement Documents Informal Inquiry

If the Respondent does not identify the statutory exception, the Procurement Division will not consider the submission confidential. The State also may seek the opinion of the PAC for guidance.

1.15 Taxes

Proposals should not include any tax from which the State is exempt.

1.16 Procurement Division Registration

In order to submit a proposal per Section 1.7, Respondents must be registered as a bidder with the Department of Administration, Procurement Division.

At Bidder Profile Registration, https://www.in.gov/idoa/procurement/supplier-resource-center/requirements-to-do-business-with-the-state/bidder-profile-registration/ the following may be completed.

Important notes:
Remember that you cannot update the primary contact's email address and use it to sign into the Supplier Portal on the same day.
No more than one proposal per Respondent may be submitted.
Responses may no longer be sent in on flash drives.

The State encourages Respondents to break down their proposals into small file sizes and use compressed zip files where possible. Uploading large files may lengthen the time to successfully submit your proposal. Checking file sizes of the proposal documents by viewing file properties is also recommended to reduce risks when uploading files.

A bidder ID and password are required to submit a response. For more information on that process, visit: https://www.in.gov/idoa/wbt/SupplierPortal/index.html. Bidder ID and password issues are handled by submitting a request for assistance to the State of Indiana Office of Technology and are handled in the order in which they are received.

IDOA is not able to assist with these types of issues, and they are not justification to miss the submission deadline.

The State strongly encourages Respondents to allow plenty of time when electronically submitting their proposals. Waiting until the last day is not recommended. The Supplier Portal allows documents to be edited until the proposal due date. Therefore, documents could be loaded over several days. The Supplier Portal will not accept proposals once the proposal due date and time has expired, even if a Respondent has already begun uploading bid documents.

1.17 Secretary of State Registration

If awarded the contract, the Respondent will be required to register, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations, and limited liability companies. Respondent must indicate status in **Attachment J, Attestation Form.** Information concerning registration with the Secretary of State may be obtained by contacting:

Secretary of State of Indiana
Corporation Division
402 West Washington Street, E018
Indianapolis, IN 46204
(317) 232-6576
www.in.gov/sos

1.18 Compliance Certification

Responses to this solicitation serve as a representation that the Respondent has no current or outstanding criminal, civil, or enforcement actions initiated by the State, and it agrees that it will immediately notify the State of any such actions. The Respondent also certifies that neither it nor its principals are presently in arrears in payment of its taxes, permit fees or other statutory, regulatory, or judicially required payments to the State.

The Respondent agrees that the State may confirm, at any time, that no such liabilities exist, and, if such liabilities are discovered, that State may bar the Respondent from contracting with the State, cancel existing contracts, withhold payments to setoff such obligations, and withhold further payments or purchases until the entity is current in its payments on its liability to the State and has submitted proof of such payment to the State.

1.19 Conflict of Interest

Any person, firm, or entity that assisted with and/or participated in the preparation of this solicitation document is prohibited from submitting a proposal to this specific solicitation. For the purposes of this solicitation, a "person" means a State officer, employee, special State appointee, or any individual or entity working with or advising the State or involved in the preparation of this solicitation proposal. This prohibition would also apply to an entity who hires, within a one-year period prior to the publication of this solicitation, a person that assisted with and/or participated in the preparation of this solicitation.

1.20 Equal Opportunity Commitment

It has been determined that there is a reasonable expectation of Indiana Veteran Business Enterprises subcontracting opportunities on a contract awarded under this solicitation. Therefore, a contract goal of 3% for Indiana Veteran Owned Small Businesses has been established. See **Attachment A** for more details.

1.21 Reserved

1.22 Americans with Disabilities Act

The Respondent specifically agrees to comply with the provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 *et seq*. and 47 U.S.C. 225).

1.23 Summary of Milestones

The following timeline is only an illustration of the solicitation process. Not all the dates below are binding.[2] Due to the unpredictable nature of the evaluation period, these dates are commonly subject to change. At the conclusion of the evaluation process, all Respondents will be informed of the evaluation team's findings.

Key Dates

Activity	Date
Issue of solicitation	October 29, 2026
Pre-Proposal Conference	Indiana Government Center South Conference Center Conference Room 4 & 5 November 13, 2026 10:00AM ET – 11:00AM ET
Deadline to Submit Written Questions & Pre-Proposal Networking Opportunities Forms	November 18, 2026 by 3:00 PM Eastern Time
Response to Written Questions/Amendments	December 2, 2026
Submission Due Date/Time	December 17, 2026 by 3:00 PM Eastern Time
Submission of Reference Check Forms to State	December 17, 2026 by 3:00 PM Eastern Time
The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.	
Award Recommendation	Spring 2027

[2] Submission dates for Proposals, and Reference Check Forms to State ARE binding and not subject to change.

Section Two
Proposal Preparation Instructions

2.1 General

To facilitate the timely evaluation of proposals, a standard format for proposal submission has been developed and is described in this section. All Respondents are required to format their proposals in a manner consistent with the guidelines described below:

- Proposals will be disqualified if received after 1.23 Summary of Milestones, Due Date.
- Each item must be addressed in the Respondent's proposal.
- The **Executive Summary** must be in the form of a letter. See Section 2.2.
- Each item, Executive Summary, and attachments must be separate, standalone electronic files. Please do not submit your proposal as one large file.
- A Bidder ID is required. See Section 1.16 Procurement Division Registration.
- Please submit all attachments in their original format. Any attempt to manipulate the format of the documents that deviates from the current format will put your proposal at risk of disqualification.
- Confidential Information must also be clearly indicated in **Attachment J**, Attestation Form Section 5.0, and a redacted file provided (See Section 1.14 Confidential Information).

2.2 Executive Summary

The **Executive Summary** must address the following topics except those specifically identified as "optional." The Executive Summary is to be attached to the Submission Form by the date and time outlined in Section 1.23.

2.2.1 Summary of Ability and Desire to Supply the Required Products or Services

The Executive Summary must briefly summarize the Respondent's ability to supply the requested products and/or services that meet the requirements defined in Section One of this solicitation.

2.2.2 Respondent Notification

Unless otherwise indicated in the Executive Summary, Respondents will be notified via e-mail. It is the Respondent's obligation to notify the Procurement Division of any changes in any address that may have occurred since the origination of this solicitation. The Procurement Division will not be held responsible for incorrect vendor, contractor or respondent addresses.

2.2.3 Other Information

This item is optional. Any other information the Respondent may wish to briefly summarize will be acceptable.

2.3 Business Proposal

The Business Proposal Template is Attachment E. The Business Proposal must address the indicated topics except those specifically identified as "optional."

2.4 Technical Proposal

The Technical Proposal Template is 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.

2.5 Cost Proposal

The Cost Proposal Template is Attachment D. The Cost Proposal must be submitted in the original format. Any attempt to manipulate the format of the Cost Proposal document, attach caveats to pricing, or submit pricing that deviates from the current format will put your proposal at risk of disqualification.

Cost Proposal Narrative
The Respondent should provide a brief narrative (not longer than two pages) in support of each Cost Proposal item. The narrative should be focused on clarifying how the proposed prices correspond directly to the Respondent's Technical Proposal. For example, evaluators will expect detailed explanation of *Maintenance and Support* to correspond to *Maintenance and Support items* if described in the Technical Proposal. **Please compose and return this document in a PDF format, labeled as "Cost Proposal Narrative".**

Cost Assumptions, Conditions and Constraints
The Respondent should list and describe as part of its Cost Proposal any special cost assumptions, conditions, and/or constraints relative to, or which impact, the prices presented on the Cost Schedules. It is of particular importance to describe any assumptions made by the Respondent in the development of the Respondent's Technical Proposal that have a material impact on price. It is in the best interest of the Respondent to make explicit the assumptions, conditions, and/or constraints that underlie the values presented on the Cost Schedules. Assumptions, conditions, or constraints that conflict with the solicitation requirements are not acceptable. **Please compose and return this document in a PDF format, labeled as "Cost Assumptions, Conditions, and Constraints".**

Pricing
Pricing on this solicitation must be firm and remain open for a period of not less than one hundred eighty (180 days) from the date of award issuance. Any attempt to manipulate the format of the document, attach caveats to pricing, or submit pricing that deviates from the current format will put your proposal at risk of being removed from consideration.

2.6 Attestation Form

The Attestation Form is Attachment J. This is the formal declaration of responses to the indicated topics cited within **Attachment J** as it relates to this solicitation.

Section Three
Proposal Evaluation

3.1 Proposal Evaluation Procedure

The State has selected a group of personnel to act as a proposal evaluation team. Subgroups of this team, consisting of one or more team members, will be responsible for evaluating proposals with regard to compliance with solicitation requirements. All evaluation personnel will use the evaluation criteria stated in Section 3.2.

The procedure for evaluating the proposals against the evaluation criteria will be as follows:

3.1.1 Each proposal will be evaluated for adherence to mandatory requirements, per Section 3.2, Step 1, on a pass/fail basis. Proposals that are incomplete or otherwise do not conform to proposal submission requirements may be eliminated from consideration. Further, any proposals not meeting the Mandatory Requirements listed in Section 3.2, Step 1, and noted in **Attachment J**, will be disqualified.

3.1.2 Each proposal will be evaluated based on the categories included in Section 3.2. A point score has been established for each category.

3.1.3 Based on the results of this evaluation, the qualifying proposal determined to be the most advantageous to the State may be selected by IDOA and INSPD for further action, such as contract negotiations. If, however, IDOA and INSPD decide that no proposal is sufficiently advantageous to the State, the State may take whatever further action is deemed necessary to fulfill its needs.

If, for any reason, a proposal is selected and it is not possible to consummate a contract with the Respondent, the State may begin contract preparation with another Respondent or determine that no such alternate proposal exists.

3.1.4 The Commissioner of IDOA or their designee will, in the exercise of their sole discretion, determine which proposal(s) offer the best means of servicing the interests of the State. The exercise of this discretion will be final.

3.2 Evaluation Criteria

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the solicitation in a cost-effective manner. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category. The points associated with each category are indicated following the category name (total maximum points = 100).

Negative points may be assigned in the cost score. Additionally, there is an opportunity for a bonus of one point if certain criteria are met. For further information, please reference Section 3.2.5.

If any one or more of the listed criteria on which the responses to this solicitation will be evaluated are found to be inconsistent or incompatible with applicable federal laws, regulations or policies, the specific criterion or criteria will be disregarded, and the responses will be evaluated and scored without considering such criterion or criteria.

Summary of Evaluation Criteria:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	**45 available points**
3. Cost (Cost Proposal)	**50 available points**
4. Buy Indiana	5
Total	**100 points**

All proposals will be evaluated using the following approach.

Step 1

In this step, proposals will be evaluated only against Criteria 1 to ensure that they adhere to Mandatory Requirements. Any proposals not meeting the Mandatory Requirements will be disqualified. The Mandatory Requirements are:

- **Executive Summary** and required content
- **Attachment D** Cost Proposal
- **Attachment E** Business Proposal
- **Attachment F** Technical Proposal, unaltered and complete with all requested supporting documents.
- **Attachment J** Attestation Form, complete with all requested supporting documents
- **Infrastructure Overview**

- **AI Technical Proposal Questions**

Additionally, a Respondent must not have had any State contract or purchase order terminated or cancelled within the last two calendar years due to Respondent's failure to deliver products or services timely and in accordance with all terms of an accepted proposal or a state contract. IDOA retains full discretion to determine vendor responsibility and may reject any bid received (See IC 5-22-16-1).

Step 2

Typically, the proposals that fulfil the Step 1 Mandatory Requirements will then be scored based on Criteria 2 and 3 ONLY. All proposals will be ranked based on their combined scores for Criteria 2 and 3 ONLY. This ranking will be used to create a "short list". Any proposal not making the "short list" will not be further evaluated.

However, we reserve the right to shortlist respondents at our discretion, utilizing Minimum Acceptable Qualifications (MAQ) and cost scores, or MAQ scores alone, when it is in the State's best interest. The determination of the shortlisting criteria will be made by the evaluation team based on the specific circumstances of the evaluation process.

Step 2 may include one or more rounds of proposal discussions, oral presentations, clarifications, and/or demonstrations focused on cost and other proposal elements. Step 2 may include additional "short lists" at the State's sole discretion.

Step 3

The short-listed proposals will then be evaluated based on the entire evaluation criteria outlined in the table above.

If the State conducts additional rounds of discussions and a BAFO round which leads to changes in either the Technical or Cost Proposal for the short-listed Respondents, their scores will be recomputed. The section below describes the different evaluation criteria.

3.2.1 Adherence to Requirements – Pass/Fail
Respondents passing this category move to Phase 2

The following 2 categories cannot exceed 100 points.

3.2.2 Management Assessment/Quality
45 available points

3.2.3 Price
50 available points

Cost scores will then be normalized to one another, based on the lowest cost proposal evaluated. The lowest cost proposal receives a total of 50 points.

The normalization formula is as follows:
Respondent's Cost Score = (Lowest Cost Proposal / Total Cost of Proposal) X 50

3.2.4 Buy Indiana Initiative – 5 points

Respondents qualifying, and documenting per **Attachment J,** as an Indiana Company as defined in Attachment J, will receive 5 points in this category.

3.2.5 Reserved

3.2.6 Reserved

3.2.8 Reserved