



STATE OF ARKANSAS
DEPARTMENT OF TRANSFORMATION AND SHARED SERVICES
OFFICE OF STATE PROCUREMENT
501 Woodlane St., Ste. 220
Little Rock, Arkansas 72201-1023

REQUEST FOR PROPOSAL (MAP)
SOLICITATION DOCUMENT

| SOLICITATION INFORMATION | | | |
|--------------------------|--|----------------------|----------------|
| Solicitation Number: | SP-21-0058 | Solicitation Issued: | March 16, 2021 |
| Description: | Digital Marketing and Advertising Services | | |
| Department: | Arkansas Insurance Department | | |

| SUBMISSION DEADLINE | | | |
|---|---------------|------------------------|-------------------------|
| Proposal Opening Date: | April 6, 2021 | Proposal Opening Time: | 2:00 p.m., Central Time |
| Deliver proposal submissions for this Request for Proposal to the Office of State Procurement on or before the submission deadline. Proposals received after the submission deadline may be rejected as untimely. See Section 1.2 for information regarding Live Proposal Openings. | | | |

| DELIVERY OF RESPONSE DOCUMENTS | |
|--|--|
| Delivery Address and RFP Opening Location: | Department of Transformation and Shared Services Office of State Procurement 501 Woodlane St., Ste. 220 Little Rock, Arkansas 72201-1023 Delivery providers, USPS, UPS, and FedEx deliver mail to OSP's street address on a schedule determined by each individual provider. These providers will deliver to OSP based solely on the street address. Prospective Contractors assume all risk for timely, properly submitted deliveries. |
| Proposal's Outer Packaging: | Seal outer packaging and properly mark with the following information. If outer packaging of Proposal submission is not properly marked, the package may be opened for Proposal identification purposes. <ul style="list-style-type: none">• Solicitation number• Date and time of Proposal opening• Prospective Contractor's name and return address |

| OFFICE OF STATE PROCUREMENT CONTACT INFORMATION | | | |
|---|---|------------------------------|--------------|
| OSP Buyer: | Julia Shackelford | Buyer's Direct Phone Number: | 501-371-6079 |
| Email Address: | Julia.shackelford@dfa.arkansas.gov | OSP's Main Number: | 501-324-9316 |
| OSP Website: | https://www.transform.ar.gov/procurement/ | | |

SECTION 1 – GENERAL INFORMATION AND INSTRUCTIONS

- **Do not** provide responses to items in this section unless specifically and expressly required.

1.1 INTRODUCTION

This Request for Proposal (RFP) is issued by the TSS Office of State Procurement (TSS OSP) for the Arkansas Insurance Department (hereinafter referred to as “Department”) Arkansas Senior Health Insurance Information Program (AR SHIIP) to obtain pricing and a contract for digital marketing and advertising services.

A contract will be awarded to the Prospective Contractor determined to have submitted the most advantageous Proposal to the Department.

Direct all questions, comments, or concerns you may have regarding this solicitation to the TSS OSP, not the Department.

1.2 LIVE PROPOSAL OPENING

Use the information below to view the Proposal opening online.

Zoom Meeting Link:

<https://arkansas-gov.zoom.us/j/86575850072?pwd=c1o5TFdndkxIakpIV2Z0NzBwRWJkZz09>

Meeting ID: 865 7585 0072

Meeting Code : 945261

Dial-In Information: 877 853 5257 US Toll-free

888 475 4499 US Toll-free

1.3 TYPE OF CONTRACT

- As a result of this RFP, TSS OSP intends to award a contract to a single Contractor.
- The anticipated starting date for any resulting contract is July 1, 2021, except that the actual contract start date may be adjusted unilaterally by the State for up to three (3) calendar months. By submitting a signed Proposal in response to the RFP, the Prospective Contractor represents and warrants that it will honor its Proposal as being held open as irrevocable for this period.
- The initial term of a resulting contract will be for three (3) years. Upon mutual agreement by the Contractor and the Department, the contract may be renewed by TSS OSP for up to four (4) additional one-year terms or portions thereof, not to exceed a total aggregate contract term of seven (7) consecutive years.

1.4 SOLICITATION SCHEDULE

- For informational purposes, TSS OSP is providing a Solicitation Schedule; however, dates listed and noted with an asterisk (*) are anticipated dates only and are subject to change at the discretion of the State.

TABLE A: TENTATIVE SOLICITATION SCHEDULE

| ACTIVITY | DATE |
|---|-------------------------------|
| RFP Release to Prospective Contractors | March 16, 2021 |
| Bidders Conference | March 22, 2021 |
| Deadline for Prospective Contractor Questions | March 24, 2021, 4:00 p.m. CST |
| Answers to Questions Posted to TSS OSP Website* | March 29, 2021 |
| Proposal Due Date | April 6, 2021, 2:00 p.m. CST |

| | |
|-------------------------------|-------------------|
| Initial Proposal Evaluation* | April 9, 2021 |
| Interviews* | April 13-14, 2021 |
| Final Proposal Evaluation* | April 14, 2021 |
| Discussions Kick Off Meeting* | April 21, 2021 |
| Finalize Discussions* | April 27, 2021 |
| Post Anticipation to Award* | April 28, 2021 |
| ALC Review* | May 21, 2021 |
| Award Contract* | July 1, 2021 |

1.5 BIDDERS CONFERENCE

A. TSS OSP will host a bidder's conference to provide additional information and clarification regarding the RFP.

1. The conference will take place at the date and time listed in Section 1.4 Table A.
2. The conference is important for Prospective Contractors to understand the tasks a Prospective Contractor **shall** complete when submitting a Proposal ("Submission Requirements").
3. Prospective Contractors may attend the conference via Zoom.

Zoom Conference Link

<https://arkansas-gov.zoom.us/j/88321117465?pwd=eDBFOTgwRINJQ3dyZFhZc1VDYS95QT09>

Meeting ID: 883 2111 7465

Meeting Passcode: 410462

Dial-In Information: 877 853 5257 US Toll-free
888 475 4499 US Toll-free

4. The bidders conference presentation will be posted with the RFP to the TSS OSP website at <https://www.arkansas.gov/tss/procurement/bids/>.

1.6 CLARIFICATION OF SOLICITATION

A. Submit any questions requesting clarification of information contained in this Solicitation in writing via email by the date and time listed in Section 1.4 Table A to the TSS OSP buyer as shown on page one (1) of this Solicitation.

1. Prospective Contractors **shall** submit questions using *Attachment A: Submission of Written Questions*.
2. For each question submitted, Prospective Contractor should reference the specific solicitation item number to which the question refers.
3. Prospective Contractors' written questions will be consolidated and responded to by the State as deemed appropriate. The State's consolidated written response is anticipated to be posted to the TSS OSP website by the close of business on the date provided in Section 1.4 Table A. If Prospective Contractor questions are unclear or non-substantive in nature, the State may request clarification of a question(s) or decline to answer.

B. The Prospective Contractor should notify the TSS OSP buyer of any term, condition, etc., that precludes the Prospective Contractor from submitting a compliant, Responsive Proposal. Prospective Contractors should note that it is the responsibility of the Prospective Contractor to seek resolution of

all such issues, including those relating to the terms and conditions of the contract, prior to the submission of a Proposal.

- C. Prospective Contractors may contact the TSS OSP buyer with non-substantive questions at any time prior to the Proposal opening.
- D. An oral statement by TSS OSP will not be part of any contract resulting from this solicitation and may not reasonably be relied on by any Prospective Contractor as an aid to interpretation unless it is reduced to writing and expressly adopted by TSS OSP.

1.7 DEFINITION OF TERMS

- A. Unless otherwise defined herein, all terms defined in Arkansas Procurement Law have the same meaning herein.
- B. "Prospective Contractor" means a responsible offeror who submits a Proposal in response to this Solicitation.
- C. The terms "Request for Proposal," "RFP," and "Solicitation" are used synonymously in this document.
- D. "Requirement" means a specification that a Contractor's commodity and/or service **must** meet or exceed in the performance of its contractual duties under any contract awarded as a result of this RFP. These Specifications will be distinguished by using the terms "shall" or "must" in the Requirement.
- E. "Responsive Proposal" means a Proposal submitted in response to this Solicitation that conforms in all material respects to this RFP.
- F. "Specification" means any technical or purchase description or other description of the physical or functional characteristics, or of the nature, of a commodity or service. "Specification" may include a description of any Requirement for inspecting, testing, or preparing a commodity or service for delivery.
- G. "State" means the State of Arkansas. When the term "State" is used herein to reference any obligation of the State under a contract that results from this Solicitation, that obligation is limited to the Department using such a contract.

1.8 RESPONSE DOCUMENTS

- A. Original *Technical Proposal Packet*
 - 1. Responses within the *Information for Evaluation* and *Exceptions* sections **must not** contain the Prospective Contractor's name or any other identifiers, including without limitation names of staff members, projects, products, and addresses.
 - 2. Prospective Contractors **shall** utilize the *Technical Proposal Packet* to submit their responses.
 - 3. The following items are Proposal Submission Requirements and **must** be submitted as a hard copy in the Prospective Contractor's Proposal response.
 - a. Original signed *Proposal Signature Page*. Signature may be ink or digital. (See *Technical Proposal Packet*.)
 - b. Technical Proposal response to the *Information for Evaluation* section included in the *Technical Proposal Packet*. Proposal response **must** be in the English language.

- c. Response to the *Official Solicitation Price Sheet*. Pricing **must** be proposed in U.S. dollars and cents.
 - d. Proposed *Subcontractors Form*. The utilization of any proposed subcontractor is subject to approval by the Department.
 - e. *Exceptions Form*.
- B. The following items, which **must** be submitted prior to a contract award to the Prospective Contractor, may also be included with the Prospective Contractor's Proposal:
1. *EO 98-04: Contract and Grant Disclosure Form*.
 2. Copy of Prospective Contractor's *Equal Opportunity Policy*.
 3. *Voluntary Product Accessibility Template* (VPAT), <https://www.itic.org/policy/accessibility/vpat>; use the VPAT 2.3Rev 508 version.
- C. In addition to the original *Technical Proposal Packet* and the *Official Solicitation Price Sheet*, the following electronic items should be submitted, preferably on a flash drive and in PDF format (do not send electronic copies via email or fax):
1. One (1) electronic copy of the *Technical Proposal Packet*.
 - a. The *Information for Evaluation and Exceptions Form* sub-sections should be a separate file on the flash drive.
 - b. The electronic copy **must** be identical to the original hard copy. In case of a discrepancy, the original hard copy governs.
 - c. If TSS OSP requests additional copies of the Proposal, the copies **must** be delivered within the timeframe specified in the request.
 2. One (1) electronic copy of the *Official Solicitation Price Sheet*.
 3. One (1) redacted (marked "REDACTED") copy the original *Technical Proposal Packet*.

1.9 ACCEPTANCE OF REQUIREMENTS

- A. Unless a Prospective Contractor expressly and conspicuously identifies any exception or exceptions to any of the Requirements in the Requirements Section of this RFP by listing them on the *Exceptions Form* (see *Technical Proposal Packet*), Prospective Contractor understands and agrees its submission of a Proposal to represent that its Proposal meets all such Requirements.
- B. A Prospective Contractor's Proposal may be rejected if a Prospective Contractor takes exception to any Requirements in the Requirements Section of this RFP.

1.10 ADDITIONAL TERMS AND CONDITIONS

- A. This RFP incorporates all of the *Solicitation Terms and Conditions* located on the TSS OSP website here (Agencies – Forms and Reporting – Solicitation Templates): <https://www.transform.ar.gov/procurement/agencies/forms-and-reporting/>.
1. Price increases will be considered at the time of contract renewal.
 2. The Contractor **shall** provide to TSS OSP a written request for the price increase. The request **must** include supporting documentation demonstrating that the increase in contract price is based

on an increase in market price. TSS OSP has the right to require additional information pertaining to the requested increase.

3. Increases will not be considered to increase profit or margins.

4. TSS OSP has the right to approve or deny the request.

- B. Any special terms and conditions included in this Solicitation **shall** override the *Solicitation Terms and Conditions*.
- C. Unless a Prospective Contractor expressly and conspicuously identifies any exception or exceptions to any of the terms in the *Services Contract (SRV-1) Fillable Form* by listing them on the *Exceptions Form* (see *Technical Proposal Packet*), Prospective Contractor agrees and **shall** adhere to all terms if selected as the successful Contractor. Items identified as non-negotiable may only be modified if the legal Requirement is satisfied and approved by the State. The *Services Contract (SRV-1) Fillable Form* can be viewed on the TSS OSP website here (Agencies – Services – Forms): <https://www.transform.ar.gov/procurement/agencies/services/>.

SECTION 2 – REQUIREMENTS

- **Do not** provide responses to items in this section unless specifically and expressly required.

2.1 AR SHIIP OVERVIEW AND OBJECTIVES

AR SHIIP seeks to establish a contract with a qualified advertising firm to provide digital marketing and advertising services to educate Arkansans about the free services available to them through AR SHIIP.

Arkansas Senior Health Insurance Information Program (AR SHIIP) connects Medicare beneficiaries, their families, and caregivers with certified counselors statewide. AR SHIIP's local counselors offer one-to-one, in person or over the phone guidance regarding Medicare, Medicare Advantage Plans, Medicare Supplements, and Medicare Part D (drug plans) for free.

AR SHIIP partners screen individuals to determine if Medicare recipients are eligible for low-income subsidies or help with drug costs. AR SHIIP and partners examine ways to lower out-of-pocket expenses of Medicare and review other ways for Arkansans to save money.

AR SHIIP seeks advertising services to expand its current reach by increasing its digital footprint. AR SHIIP seeks to accomplish the following objectives through a resulting contract:

1. Educate and inform the public of AR SHIIP's mission and services by partnering creative and innovative digital marketing strategies with its existing grassroots approaches.
2. Use social media outlets such as Facebook and Twitter to reach targeted audiences.
3. Increase traffic to the AR SHIIP website.

2.2 PROSPECTIVE CONTRACTOR MINIMUM QUALIFICATIONS

Prospective Contractor **shall** be a full-service advertising and marketing firm physically located in the United States with experience in successfully developing advertising and marketing plans; developing, hosting, and maintaining websites and social media accounts; and providing public information/education/awareness-oriented campaigns and social norming methods on projects of a similar size and scope to those specified in this RFP.

2.3 GENERAL REQUIREMENTS

- A. The Contractor **shall** provide social and digital media advertising and marketing services in accordance with the Requirements specified herein and the direction provided by designated AR SHIIP staff.
- B. The Contractor **shall** design, develop, coordinate, and manage digital media, search engine marketing (SEM), social media platforms, and promotional materials in collaboration with, and on behalf of, AR SHIIP.
 1. The Contractor **shall** translate and produce materials into Spanish and Marshallese as requested by AR SHIIP.
- C. The Contractor **shall** identify and advise as to how AR SHIIP can maximize emerging, innovative, and creative technology and trends in digital marketing, design, and development and **shall** implement identified technology and trends as directed by AR SHIIP.
- D. The Contractor **shall** meet all specified marketing plan and project deadlines and **shall** keep within established budget guidelines.

- E. The Contractor **shall** use images and messages that are commensurate with the dignity of the State of Arkansas.
- F. The Contractor **shall** prepare advertisements, presentation materials, and collateral materials to include, but not be limited to, copy and layouts, finished artwork, photographs, testimonials, story boards, scripts, music rights, filming, recording, video dubbing, editing, slide and video production, equipment rentals, scenery, properties, costumes, display materials, merchandising materials, brochures, copy writing, graphs, design, power point, electronic design, etc. as required to meet all contract Requirements.
 - 1. The Contractor will have access to AR SHIIP's pool of digital and traditional photographs, slides, and B-roll for use in marketing materials.
- G. The Contractor **shall** cooperate and coordinate services with AR SHIIP and its designees, including other contractors and entities representing AR SHIIP, to present a coordinated message.
- H. The Contractor **shall** measure, track, and evaluate all social analytics to ensure maximum reach to target audiences.
- I. The Contractor **shall** adhere to all applicable State and federal, laws, regulations, policies, and industry standards, including but not limited to accessibility compliance.
- J. The Contractor **shall** propose report formats, submission deadlines, and submission methods for each plan and report identified throughout the RFP and **shall** adhere to the formats, deadlines, and methods approved by AR SHIIP.

2.4 DIGITAL MARKETING PLAN REQUIREMENTS

- A. The Contractor **shall** develop and implement an AR SHIIP-approved, comprehensive, research-based, strategic digital marketing plan to maximize exposure to target audiences and maximize the value of media purchased under the allocated budget (added value) for each year during a resulting contract.
- B. The Contractor **shall** submit marketing plan components to AR SHIIP staff for approval as specified by AR SHIIP.
- C. The marketing plan **must** include long-term and annual goals, measurable objectives, and strategies for effectively articulating and promoting the services provided by AR SHIIP.
- D. The marketing plan **must** include campaign proposals, a detailed cost management plan, a quality management plan, a staffing management plan, and communications management plan, and a risk management plan.
- E. The Contractor **shall** give AR SHIIP complete and total approval authority of the marketing plan, budgets, and all parts contained within, and **shall** revise those components as requested by AR SHIIP.
- F. At the conclusion of each year (or as requested by AR SHIIP), the Contractor **shall** assess the overall impact of the marketing plan and **shall** submit its findings to AR SHIIP, along with a detailed cost analysis of the year's marketing plan, in a written report.

2.5 DIGITAL MEDIA PLACEMENT REQUIREMENTS

- A. The Contractor **shall** place advertising approved by AR SHIIP through a combination of both paid placement ads and public service announcements of equal value, maximizing the exposure to target audiences and the value of media purchased under the allocated budget.

- B. The Contractor **shall** provide optimal media coverage to ensure the budget is maximized and in accordance with a schedule approved by AR SHIIP using approved media.

2.6 DATA AND STORAGE REQUIREMENTS

- A. The Contractor **shall** perform all work on the AR SHIIP account from within the continental United States of America (USA). The system **must not** be accessed from outside of the continental USA.
- B. All servers and data associated with the resulting contract **must** reside in the continental USA.

2.7 OWNERSHIP AND TRANSITION REQUIREMENTS

- A. Upon contract termination, cancellation, and/or should expiration, the Contractor **shall** assist AR SHIIP and the new Contractor, to the extent AR SHIIP determines necessary, to ensure an orderly transfer of responsibility and the continuity of those services required under the terms of the contract to another organization designated by AR SHIIP.
- B. The Contractor **shall** provide at no charge to AR SHIIP, all records, documentation, reports, data, recommendations, and/or printing elements, etc., produced under a resulting contract to AR SHIIP or to AR SHIIP's designee, within seven (7) days of AR SHIIP's request, contract termination, or contract cancellation.
 - 1. The Contractor **shall** follow the method of delivery determined by AR SHIIP.
 - 2. This Requirement does not refer to the Contractor's intellectual property.
- C. The Contractor **shall** provide all services to execute the successful transition of services data.
- D. All data, records, files, and other information relating to the AR SHIIP account **must** remain the property of AR SHIIP and **must** be released to AR SHIIP in the event the contract is ended.

2.8 PERFORMANCE STANDARDS

- A. State law requires that qualifying contracts for services include Performance Standards for measuring the overall quality of services that a Contractor **shall** provide.
- B. The State may be open to negotiations of Performance Standards prior to contract award, prior to the commencement of services, or at times throughout the contract duration.
- C. Performance Standards **shall not** be amended unless they are agreed to in writing and signed by the parties.
- D. Failure to meet the minimum Performance Standards as specified will result in the assessment of damages.
- E. In the event a Performance Standard is not met, the Contractor will have the opportunity to defend or respond to the insufficiency. The State has the right to waive damages if it determines there were extenuating factors beyond the control of the Contractor that hindered the performance of services. In these instances, the State has final determination of the performance acceptability.
- F. Should any compensation be owed to the Department due to the assessment of damages, Contractor **shall** follow the direction of the Department regarding the required compensation process.

SECTION 3 – SELECTION

- **Do not** provide responses to items in this section.

3.1 SELECTION PROCESS

- A. TSS OSP will review each *Technical Proposal Packet* to verify submission Requirements have been met. *Technical Proposal Packets* that do not meet submission Requirements will be rejected and will not be evaluated.
- B. The Department appointed Evaluation Committee will evaluate and score qualifying Technical Proposals. Evaluation will be based on Prospective Contractor's response to the *Information for Evaluation* section included in the *Technical Proposal Packet*.
1. Members of the Evaluation Committee will individually review and evaluate Proposals and complete an Individual Score Worksheet for each Proposal. Individual scoring for each Evaluation Criteria will be based on the following Scoring Description.

| Score | Description |
|-------|---|
| 10 | The response provides metrics clearly establishing that the Prospective Contractor is reliable and capable of fully performing the required services. |
| 5 | The response provides metrics suggesting that the Prospective Contractor's level of performance may be acceptable, but it does not clearly establish that the Prospective Contractor is reliable and capable of fully performing the required services. |
| 0 | The response provides metrics clearly establishing that the Prospective Contractor is unreliable and incapable of fully performing the required services. |

2. After initial individual evaluations are complete, the Evaluation Committee members will meet to discuss their individual ratings. At this consensus meeting, each member will be afforded an opportunity to discuss his or her rating for each evaluation criteria.
 3. After committee members have had an opportunity to discuss their individual scores with the committee, the individual committee members will be given the opportunity to change their initial individual scores, if they feel that is appropriate.
 4. The final individual scores of the evaluators will be recorded on the Pre-Interview Consensus Score Sheets and averaged to determine the group or consensus score and rank for each Proposal.
 5. Other agencies, consultants, and experts may also examine documents at the discretion of the Department.
- C. The Evaluation Committee will interview and score each Prospective Contractor that meets submission Requirements. Evaluation will be based on Prospective Contractor's response and follow up questions presented during the interview.
1. After each interview, the Evaluation Committee members will individually review and evaluate the interview and complete an Individual Score Worksheet for each interview. Individual scoring for each interview will be based on the Scoring Descriptions in 3.1.B.1.

2. After all interviews are complete, the Evaluation Committee members will have the opportunity to discuss the interviews and revise their individual technical scores on the Post-Interview Consensus Score Sheet based on the information provided during the interview.
 3. The final individual scores of the Evaluation Committee members will be recorded on the Post-Interview Consensus Score Sheets and averaged to determine the group or consensus score and rank for each Proposal.
- D. The State will conduct cost checks based on the cost submitted by each Prospective Contractor on the completed *Official Solicitation Price Sheet*.
1. After Proposal opening, the State may invite Prospective Contractors who submitted a Responsive Proposal with a proposed cost that falls twenty-five percent (25%) or more from the average submitted cost to justify their submitted cost.
 2. During the final consensus meeting, cost information will be provided to the Evaluation Committee members to allow the Evaluation Committee to determine if moving forward with the highest-ranking Prospective Contractor is the most advantageous to the State.
 3. Should the State request clarification and/or additional information regarding cost, Prospective Contractors **shall** provide clarification and/or additional information as specified by the State.
- E. The State will move forward to discussions with the highest-ranking, responsible Prospective Contractor based on the Grand Total Score for each Proposal unless an alternate decision is made under 3.1.D.2.

3.2 EXPLANATION OF THE SUB-SECTIONS OF THE TECHNICAL PROPOSAL

A. Experience

1. The Experience sub-section included in the *Technical Proposal Packet* allows Prospective Contractors to differentiate themselves based on their experience, technical capability and understanding of the State's specific needs.
2. Should identify expertise in the form of a claim and provide relevant experience to support each claim.
3. Prospective Contractors should use verifiable metrics (number of accounts, size of accounts, years of experience, customer satisfaction ratings) to support each claim.

B. Solution

1. The Solution sub-section included in the *Technical Proposal Packet* allows Prospective Contractors to differentiate themselves based on their proposed solution to solve the State's specific needs.
2. Prospective Contractors should provide a high-level overview of the Prospective Contractor's proposed solution and/or approach to services using the Requirements outlined in the RFP.
3. Proposed solutions should be non-technical and include the Prospective Contractor's recommendations for meeting the objectives and Requirements of the RFP.
4. Additional service options and recommendations above and beyond those included in proposed solution should be included in the Recommended Options sub-section.

C. Risk

1. The Risk sub-section included in the *Technical Proposal Packet* allows Prospective Contractors to identify and prioritize major risks that they reasonably foresee could potentially prevent or impair the Prospective Contractor's delivery of the solution as offered in the Proposal or to otherwise fail to meet the State's desired outcome, specifications, and performance standards, and how they will mitigate, manage and/or minimize each risk listed.
 - a. Prospective Contractors should include sources, causes, or actions that are both within and beyond the control of the Prospective Contractors that they reasonably foresee may cause cost increases, delays, amendments, or dissatisfaction to the State.
 - b. Risks should be described in simple, clear, and non-technical terms.
 - c. Prospective Contractor should explain how the Prospective Contractor will mitigate, manage, and/or minimize each risk listed.
 - i. The Documented Performance cell should include details such as how many times any identified risk was previously mitigated and the impact on the Prospective Contractor's performance in terms of time, cost, and client satisfaction.

D. Recommended Options

1. The Recommended Options sub-section included in the *Technical Proposal Packet* allows Prospective Contractors to identify optional service ideas that may benefit the State that were not included in the proposed solution.
 - a. Where applicable, the Prospective Contractor should identify how options or ideas have been successful in previous projects through verifiable performance information.
 - b. The Prospective Contractor should list the cost and time impact of its optional service ideas.
 - c. Cost and revenue impacts associated with the optional service ideas **must not** be included in the completed *Official Solicitation Price Sheet*.

E. Interview

1. The Interview will allow Prospective Contractors to further demonstrate their experience in providing the services outlined in the RFP.
 - a. Each Prospective Contractor meeting the submission Requirements will be contacted by TSS OSP to schedule an interview. Prospective Contractors **shall** attend the interview as scheduled by TSS OSP.
 - b. Prospective Contractors **shall** identify one (1) Project Lead at the time of interview confirmation who **shall** attend the interview as part of the evaluation process.
 - c. The Evaluation Committee will interview the Prospective Contractor's identified Project Lead using a pre-determined set of interview questions. Follow up questions may be asked based on responses given by the Project Lead.

3.3 TECHNICAL PROPOSAL SCORE

A. The *Information for Evaluation* section has been divided into sub-sections.

1. In each sub-section, items/questions have each been assigned a maximum point value of ten (10) points. The total point value for each sub-section is reflected in the table below as the Maximum Raw Points Possible.
2. The Department has assigned Weighted Percentages to each sub-section according to its significance.

| Information for Evaluation Sub-Sections | Maximum Raw Points Possible | Sub-Section's Weighted Percentage | * Maximum Weighted Score Possible |
|---|-----------------------------|-----------------------------------|-----------------------------------|
| Experience | 10 | 25% | 175 |
| Solution | 10 | 30% | 210 |
| Risk | 10 | 10% | 70 |
| Recommended Options | 10 | 5% | 35 |
| Interview | 10 | 30% | 210 |
| Total Technical Score | 50 | 100% | 700 |

*Sub-Section's Percentage Weight x Total Technical Maximum Weighted Score = Maximum Weighted Score Possible for the sub-section.

B. The Proposal's weighted score for each sub-section will be determined using the following formula:

$$(A/B)*C = D$$

A = Actual Raw Points received for sub-section in evaluation
 B = Maximum Raw Points possible for sub-section
 C = Maximum Weighted Score possible for sub-section
 D = Weighted Score received for sub-section

C. The Proposal's weighted scores for sub-sections will be added to determine the Total Technical Score for the Proposal.

3.4 COST SCORE

A. When pricing is opened for scoring, the maximum amount of cost points will be given to the Proposal with the lowest Grand Total Estimated Cost Per Year (Table 1), the lowest Media Placement Percentage (Table 2), and the lowest Production Commission Cost Percentage (Table 3) as shown on the completed *Official Solicitation Price Sheet*. (See *Grand Total Score* for maximum points possible for cost score.)

B. The amount of cost points given to the remaining Proposals will be allocated by using the following formula:

$$(A/B)*C = D$$

A = Lowest Total Cost or Cost Percentage
 B = Second (third, fourth, etc.) Lowest Total Cost or Cost Percentage
 C = Maximum Points for Lowest Total Cost or Cost Percentage
 D = Total Cost Points Received

3.5 GRAND TOTAL SCORE

The Technical Score and Cost Score will be added together to determine the Grand Total Score for the Proposal. The State may move forward to discussions with the Prospective Contractor determined reasonably susceptible of being selected for award.

| | Maximum Points Possible |
|---|-------------------------|
| Technical Proposal | 700 |
| Cost Table 1 | 100 |
| Cost Table 2 | 100 |
| Cost Table 3 | 100 |
| Maximum Possible Grand Total Score | 1,000 |

3.6 DISCUSSIONS

- A. During the Discussions Kick Off Meeting, the Prospective Contractor **shall** provide the following documents to the State electronically:
1. A plan and schedule to finalize discussions and contract documents.
 2. A detailed scope of work clearly identifying the Prospective Contractor's understanding, implementation, and performance of services required in this RFP, including all activities required by the Contractor and all activities expected by the State/Participating Entities.
 3. A Risk Management Plan intended to mitigate any risks, including but not necessarily limited to, the risks identified in the Risk Plan submitted in the Prospective Contractor's *Technical Proposal Packet*.
 4. A proposed financial summary, including:
 - a. The completed *Official Solicitation Price Sheet and Recommended Options* submitted in the Prospective Contractor's *Technical Proposal Packet*.
 - b. A proposed payment schedule.
 5. Proposed Progress/Risk Report template that includes the Prospective Contractor's complete implementation schedule.
- B. During the Discussions Kick Off Meeting, the Prospective Contractor **shall** address questions and/or concerns the State may have to the satisfaction of the State.
- C. During the Final Discussions Meeting, the Prospective Contractor **shall** present a final draft of the following documents to the State electronically:
1. A summary of all plans and scope of work developed during the discussions process and mutually agreed upon by the State and the Prospective Contractor.
 2. A detailed scope of work clearly identifying the Prospective Contractor's implementation and performance of services required in this RFP, including all provisions negotiated and agreed upon by the State and the Prospective Contractor since the Discussions Kick Off Meeting.
 3. Description of deliverables in terms of simplified metrics.
 4. The Risk Management Plan.
 5. Progress/Risk Report template that includes the Prospective Contractor's finalized implementation schedule.

6. Financial summary, including:
 - a. The completed *Official Solicitation Price Sheet* submitted in the Prospective Contractor's *Technical Proposal Packet*.
 - b. A list of agreed upon and accepted optional services (with impact to price).
 - c. A payment schedule.

7. Contact information for the Prospective Contractor's key personnel.

- D. During the Final Discussions Meeting, the Prospective Contractor **shall** present the final drafts of the items and **shall** summarize the coordination and planning completed during the discussion process.
- E. Once approved by the State, final drafted documents will become part of the resulting contract.
- F. The Prospective Contractor may determine which key personnel will attend the Final Discussions Meeting.

3.7 PROGRESS/RISK REPORT

- A. During the term of the contract, the Contractor **shall** periodically submit a Progress/Risk Report (PRR) to the State that tracks the Contractor's progress and any deviations in providing services to the State.

1. The PRR **must** include, at minimum:

- a. Milestone schedule of implementation activities.
- b. Anticipated schedule and performance deviations, along with the date the deviation was identified, its likelihood of occurrence, the potential impact of the deviation, the Contractor's response plan to address each deviation, if applicable.
- c. Actual schedule and performance deviations, along with the date the deviation was identified, the progress of the Contractor's response to each deviation, the potential impact of the deviation, and the Contractor's anticipated and actual resolution dates, if applicable.
- d. An updated Risk Management Plan.
- e. Performance standard criteria and applicable metrics (and damages, if applicable).

2. Should a major deviation be identified that is anticipated to have a significant impact on the Contractor's performance, the Contractor **shall** notify the State within one (1) hour of identification.

3. The PRR **must** be submitted via email to the State's primary contact in a format and on a schedule agreed to by the Contractor and approved by the Department.

4. The PRR does not substitute for, or eliminate, other traditional reporting.

- B. The State will provide a satisfaction rating to the Contractor for each deviation included on the PRR.

3.8 PROSPECTIVE CONTRACTOR ACCEPTANCE OF EVALUATION TECHNIQUE

The submission of a *Technical Proposal Packet* signifies the Prospective Contractor's understanding and agreement that some subjective value judgments will be made during the evaluation and scoring of the Technical Proposals.