

**SECTION VIII**

**PROPOSAL FORMAT**

Addendum 5 – 12/18/07

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**A. INTRODUCTION**

These instructions prescribe the mandatory proposal format and the approach for the development and presentation of proposals. Format instructions must be followed, all requirements and questions in the RFP must be answered, and all requested data must be supplied.

Proposals must address requirements in Section IV, Proposed System; Section V, Administrative Requirements; and VI, Statement of Work, of the RFP in the order in which they are presented. Each RFP requirement response in the proposal must reference the exact location where the requirement is found in the RFP. The proposal must respond to all requirements. The proposal must include all required exhibits specified in Section V, Administrative Requirements and Section VI, Statement of Work.

All pages in the proposal must be standard 8½ x 11 paper, except charts and diagrams, which may be foldouts. If foldouts are used, the folded size must fit within the 8½ x 11 format. Each volume of the proposal must be provided separately in a 3-ring binder.

Page numbers must be located in the same page position throughout the proposal. Figures, tables, and charts must be assigned index numbers and must be referenced by these numbers in the proposal text and in the proposal Table of Contents. Figures must be placed as close to text references as possible.

The following must be shown on each page of the proposal:

- RFP OSI 2046
- Name of the Bidder
- Proposal volume number
- Proposal part
- Page number

The proposal shall be completely sealed. One (1) complete set of all required volumes shall be clearly marked "MASTER COPY." Costs must be sealed separately. Each sealed proposal container must be labeled as follows:

- Name of Bidder
- RFP OSI 2046
- (Draft or Final) Proposal

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**B. FINAL PROPOSAL FORMAT AND CONTENT**

The Final Proposal must be submitted prior to the date and time specified in Section I, Introduction and Overview of Requirements and in the manner specified in Section II, Rules Governing Competition for Final Proposal submission. The Final Proposal must be submitted in the number of copies indicated, and must be structured in the following manner:

- Volume 1 – Response to Requirements - Master plus eight (8) hard copies and two (2) electronic copies; one (1) electronic copy shall be in Microsoft Word format.
  - Cover Letter
  - Table of Contents
  - Part 1 – Executive Summary
  - Part 2 – Response to Administrative Requirements
  - Part 3 – Response to Statement of Work Requirements
- Volume 2 – Completed Contract – Master plus six (6) hard copies and two (2) electronic copies; one (1) electronic copy shall be in Microsoft Word format.
- Volume 3 – Costs – Master plus six (6) hard copies and two (2) electronic copies; one (1) electronic copy shall be in Microsoft Word format.
- Volume 4 – Literature – Master plus three (3) hard copies and two (2) electronic copies.

One (1) complete set of all required volumes shall be clearly marked “MASTER COPY.”

**Volume 1 - Response to Requirements**

Final Proposal Volume 1 must be in the order and format indicated below. Each page must be numbered as described in Section 8, Paragraph A, Introduction. The organization of the proposal volume must be as follows:

a) Cover Letter

The Cover Letter must be prepared and signed in accordance with RFP Section II, Rules Governing Competition.

The Cover Letter must be on the Bidder's official business letterhead stationery. Cost information must not be included in the Cover Letter. The cover letter must be included as the first page of Final Proposal Volume 1.

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b) Table of Contents

All major parts of the Final Proposal, including exhibits, must be identified by volume, part, and page number. All figures, charts, and graphs must be identified by index number and page number.

c) Part 1 – Executive Summary

Final Proposal Volume 1, Part 1 must contain an Executive Summary of the salient features of the proposal. The Executive Summary must condense and highlight the contents of the proposal to provide a broad understanding of the entire proposal and to facilitate the evaluation of the proposal by the State. The Executive Summary should include conclusions and generalized recommendations. Such conclusions and recommendations will not be evaluated and will not be a factor in selection of the successful proposal. **COST INFORMATION MUST NOT BE INCLUDED IN THE EXECUTIVE SUMMARY.**

d) Part 2 – Response to Administrative Requirements

Final Proposal Volume 1, Part 2 must contain a detailed narrative of compliance and/or response for each item (all paragraphs and subparagraphs) identified in RFP Section V, Administrative Requirements.

The organization of Part 2 must be:

- Tab 2.1 Subcontractors List (Exhibit V-C)
- Tab 2.2.1 Corporate Background and Experience Matrix (Exhibit V-B)
- Tab 2.2.2 Bidder History and Client Reference: Bidder Corporate Project Experience (Exhibit V-E.1) forms
- Tab 2.3.1 Corporate Background and Experience Matrix (Exhibit V-B)
- Tab 2.3.2 Bidder History and Client Reference: Bidder Corporate Fingerprint Database Experience (Exhibit V-E.2) forms
- Tab 2.4.1 Corporate Background and Experience Matrix (Exhibit V-B)
- Tab 2.4.2 Bidder History and Client Reference: Bidder Corporate Database Experience (Exhibit V-E.3) forms

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- Tab 2.5 Bidder History and Client Reference: Subcontractor Corporate References (Exhibit V-E.4) forms
- Tab 2.6 M & O Staff Resumes
- Tab 2.7.1 Project Manager Reference Form (Exhibit V-F)
- Tab 2.7.2 Contractor Core Staff Requirements Form (Exhibit V-G)
- Tab 2.8 Detailed Staffing Plan
- Tab 2.9.1 STD 204, Payee Data Record
- Tab 2.9.2 Certification Regarding Debarment Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions (Exhibit V-D)
- Tab 2.10 Entire section intentionally deleted
- Tab 2.11 Certification of Compliance with the American Disabilities Act (ADA) of 1990 (Exhibit V-I)
- Tab 2.12 DVBE Documentation (STD Form 840 (REV 4-1-2003) WITHOUT COST INFORMATION or a copy of your firms approved DVBE Business Utilization Plan. This goes in Volume 3.
- Tab 2.13 EZA Preference (STD 831, OPTIONAL)
- Tab 2.14 TACPA Preference (STD 830, OPTIONAL)
- Tab 2.15 LAMBRA Preference (STD 832, OPTIONAL)
- Tab 2.16.1 Intent to Claim Small Business Preference
- Tab 2.16.2 Small Business Approval Letter (IF CLAIMED)
- Tab 2.17 Bidder Declaration (Exhibit V-H)
- Tab 2.18.1 Domestic Stock Corporation (Form SI – 200) or Statement of Information – Foreign Corporations (Form SI - 350)
- Tab 2.18.2 Corporate Disclosure Statement – Publicly Traded Corporations (Form SI – PT)

Deleted: Letter of Bondability (WITHOUT COST INFORMATION and Terms and Conditions of the Performance Bond

All Tabs must be included in the response, for those Tabs which do not apply to the Bidder's proposal, a page shall be inserted indicating that the Bidder is not submitting any information for this particular tab as it does not apply to the proposal.

e) Part 3 - Response to Statement of Work Requirements

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The organization of Part 3 must be:

Tab 3.1 List of Equipment Contractors

Tab 3.2 Transition-In Plan

Tab 3.3 List of Computer Hardware and Software

**Volume 2 - Completed Contract**

This volume must contain the signed Contract, with State approved contract language and all attachments with all appropriate blanks completed. Do not include Cost Sheets. The Contract is provided as RFP Appendix A and includes the following components:

- STD 213
  - Complete and sign the Standard Agreement Form (Standard 213) in the area under the words, “Contractor”.
  - The Bidder should insert their name on line one (1) where it says, “Contractor’s Name”.
  - Fill out the Contractor information in the lower left corner.
  - Do not fill in any other sections on the Standard Agreement Form. They will be completed by the State at the time of Contract Award.
- General Provisions – Information Technology – GPSD 401 IT,
- Special Terms and Conditions,

Deleted: Information Technology – General Terms and Conditions

Deleted: SFIS Special Provisions

The General Provisions – Information Technology and Special Terms and Conditions for this volume must be complete in every detail except cost information. No costs shall be included in any of General Provisions – Information Technology and Special Terms and Conditions.

Deleted: The Attachments A and B for this volume must be complete in every detail except cost information. No costs shall be included in any of Attachment A and Attachment B.

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**Volume 3 - Costs**

Volume 3 must be separately sealed and clearly labeled: Volume 3 - COSTS. Volume 3 will not be opened for evaluation until Administrative and Statement of Work evaluation and scoring have been completed as described in Section IX, Evaluation and Selection. Volume 3 must contain all completed tables required by the RFP. At the time of Contract Award, Volume 3 Costs will be included in the Contract.

The organization of Volume 3 must be:

- Part 1 – Exhibits VII-A and VII-B - Cost Tables
- Part 2 – Summary of DVBE Participation with completed cost information DVBE Participation STD Form 840 (if applicable)
- Part 3 – Entire section intentionally deleted

Deleted: Security Document (either the Letter of Bondability or the Performance Bond)

**Volume 4 - Literature**

Volume 4 must contain all technical and other reference literature the Bidder chooses to supply to support the responses to the requirements in this RFP. The Volume must contain an index, which cross-references the literature into the RFP Requirement the literature is supporting.

If the Bidder does not choose to provide such material, a statement of intentional omission must be provided in Volume 4.

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**C. DRAFT PROPOSAL FORMAT AND CONTENT**

The Draft Proposal must contain all the material specified above for the Final Proposal. However, there must be "XXX's" in place of all cost figures in all Volumes of the Proposal. Volume 3, Costs, must not contain any cost figures. All information in Volume 3 Costs must have "XXX's" in place of all cost figures. The contract, cover letter and forms need not be signed at this point. It is important that all exhibits and all cost tables be completed with all entries except dollar figures.

Inclusion of cost figures in the Draft Proposal may result in elimination of the Vendor from further participation in the procurement process.

The following number of copies of the Draft Proposal must be submitted for validation:

Volume 1 – Response to Requirements – Master plus 8 copies and an electronic copy.

Volume 2 – Completed Contract – Master plus 6 copies and an electronic copy.

Volume 3 – Costs – Master plus 6 copies and an electronic copy.

Volume 4 – Literature – Master plus 2 copies and an electronic copy.

One (1) complete set of all required volumes shall be clearly marked "MASTER COPY."