*Agency Name*

Request for Proposal

*Title of the Procurement*

*BidBuy Bid Number*

1. SCOPE OF WORK
   1. OVERVIEW AND PURPOSE

*This may be one or two sentences to one or two paragraphs, written clearly and concisely to allow a potential offeror to recognize whether this procurement is of interest to them. This section will help a potential offeror decide if they would like to learn more.*

*It may include:*

* + - *Goals, objectives*
    - *Key measures of success (top 3-5 quantifiable metrics)*

*For Joint Purchase add the appropriate Joint Purchase or Joint Purchase Master contract language in this section.*

* 1. DESIRED OUTCOMES OF THIS PROJECT/ENGAGEMENT

*Provide a clear, concise, & easily understandable description of the agency’s desired outcome from the project or engagement.  It may include:*

* *Project/engagement deliverables: tangible outcomes to be produced by vendor*
* *Figures, Diagrams, & Agency Reference documents: supporting explanation would be in this section. Diagrams could be attach in Section G.*
* *Attach exhibits in Section G to make this easier to follow (i.e. drawings, specs,*

*pictures, site plans, etc.)*

* *Transition/Migration: efforts to bring legacy data forward (if applicable)*
  1. SCHEDULE & BUDGET

*Provide a clear and transparent identification of timing needs and constraints of the project or engagement.  Agency may decide to share their budget for the project and/or historical spend if available.   Remove “&  Budget” from the heading if you do not wish to share that information.*

*Provide an estimated timeline of the procurement process. Including Posting, bid opening, evaluation, award and execution. This is an estimated timeline that will aid vendors in determining their availability of resources, and the timeline will assist the agency in staying on track.*

* 1. UNIQUE CONSIDERATIONS *(optional – delete this section if it does not apply)*

*What may be unusual in your agency environment compared to the vendor community’s other engagements?  List any conditions that are unknown or assumed.  You may want to include attachments or exhibits in Section G to help illustrate the information.* *Examples may be space considerations, collective bargaining considerations, budget considerations or anything unique to the State of Illinois.*

* 1. TERM
     1. TERM OF THIS CONTRACT: The contract resulting from this procurement will have an initial term commencing upon *ENTER DATE OR USE* “the last dated signature of the Parties” and ending on *ENTER DATE*.In no event will the total term of the contract, including the initial term, any renewal terms, and any extensions, exceed ten (10) years.Vendor shall not commence billable work in furtherance of the contract prior to final execution of the contract except when permitted pursuant to 30 ILCS 500/20-80.
     2. RENEWAL: Subject to the maximum total term identified above, the State has the option to renew for the following term(s): *Remove section A.5.2 and subcategories if renewals are no applicable.* 
        + Renewal #1: *ENTER RENEWAL TERM SUCH AS January 1, 2023 through December 31, 2023 ADD LINES IF NEEDED*
        + Renewal #2*: i.e., January 1, 2024 through December 31, 2024*
        1. Pricing for the renewal term(s), or the formula for determining price, is in the Pricing section of this solicitation.
        2. Any renewal of the resulting contract is subject to the same terms and conditions that apply to the initial term of the contract unless otherwise provided.  The State may renew the contract for any or all of the option periods specified, may exercise any of the renewal options early, and may exercise more than one option at a time based on continuing need and favorable market conditions, when in the best interest of the State.  The contract may neither renew automatically nor renew solely at the Vendor’s option.

1. CURRENT CONDITIONS
   1. OVERVIEW & BACKGROUND

*Explain the agency’s current situation. Advise vendor community if there is an existing system, program or services. What has been going on and how did you get to where you are today? Provide the vendor community an understanding of where they would be starting from or what they would be taking over.*

* 1. VOLUMES & QUANTITIES

*Explain past and anticipated quantities or volumes if relevant. This gives the vendor community a clear view of the level of service needed.*

* 1. AREAS OF CONCERN/CHALLENGES

*What are the current constraints with the program, service or system? This section provides information to the vendor community that may be important during implementation and/or transition. These areas of concern could be challenges to be met in the Offeror’s proposal. This may potentially line up with evaluation factors.*

* 1. STRENGTHS

*Tell the vendor community what is working well.   The strengths of the current system, program or service can be valuable to the vendor community. These strengths may also be important factors in your evaluation. Remove section B.4 if there is no history.*

* 1. FIGURES, DIAGRAMS, & REFERENCE DOCUMENTS (optional – delete this section if it does not apply)

*These reference documents can be utilized to provide a snapshot of the project or engagement. Examples of this are reports that are run, the workflow of the existing system, outputs.  This will be valuable information for an Offeror that is unfamiliar with the current program, service, or system. Provide a description of what is located in Section G and insert these documents in Section G.*

1. PROPOSAL REQUIREMENTS

**Only Electronic Submissions through BidBuy of Offers will be Accepted**

* 1. REQUIRED DOCUMENTS TO COMPLETE AND SUBMIT

The Offeror shall submit the listed documents in BidBuy under the Attachments tab in the appropriate “Required Attachments” spaces.

* Vendor Disclosure or IPG Active Registered Vendor Disclosure
* Technical response
* Offer to the State of Illinois Remove if IT procurement
* Offer to the State of Illinois Information and Technology Remove if Not an IT procurement
* Commitment to Diversity
* References *(If not applicable agency to remove)*
* Pricing *(only if pricing cannot be done in items tab, if not applicable agency to remove)*
* BEP Utilization Plan *(if not applicable agency to remove)*
* VBP Utilization Plan *(if not applicable agency to remove)*

Blank documents may be found on the Chief Procurement Officer for General Service’s website at <https://cpo-general.illinois.gov/solicitation-and-contract-templates.html> and on the BidBuy posting under “File Attachments:”. Business Enterprise Program/Veterans Small Business Program Utilization Plan may be downloaded from the Commission on Equity and Inclusion’s website at

<https://cei.illinois.gov/purchasing-entity-resources/compliance.html>.

Failure to submit Vendor Disclosure or IPG Active Registered Vendor Disclosure, as applicable, and the Utilization Plan(s), as applicable, with the Offer submitted in BidBuy shall render the Offer non-responsive.

Offerors are required to submit their response to the State’s solicitation through BidBuy. Any information sent to the State outside of BidBuy, for example by US Mail, FedEx, UPS, e-mail, or hand delivery, will neither be accepted nor considered. Offeror submissions will only be considered if they are received through BidBuy and on or before the time and date indicated as the “Bid Opening Date” on the BidBuy posting. Any required attachments must be submitted via BidBuy.

Price entries on the Items tab will be locked automatically upon submission of the quote. **Entering cost, pricing or discount information in the Alternate Description may result in disqualification.** If the agency requires pricing to be submitted in an attachment, Offeror shall upload pricing under the “Required Documents” section on the Attachments tab and check the box “Does the attachment contain any pricing, cost or discount information?”. Failure to check this box allows your pricing to be viewed when bids are opened and will result in disqualification of your offer. NOTE: Do not check “Does the attachment contain any pricing, cost or discount information” if the attachment does NOT include pricing, cost, or discount information.

Documents shall be submitted in an electronic format that is accessible and readable using Microsoft Office suite software or Adobe Reader. Corrupted files shall not be considered. It is the Offeror’s responsibility to check that files are accessible and legible after uploading.

The Offeror is solely responsible for ensuring timely submission of their electronic solicitation response. Failure to allow adequate time prior to the Bid Opening Date to complete and submit a response to a solicitation, particularly in the event technical support assistance from the State is required, places the Offeror and their offer or response at risk of not being accepted.

The State encourages the Offeror to ensure that their BidBuy account is up-to-date. It is recommended that you access your BidBuy account prior to the solicitation due date and time to make sure that your company’s information is up-to-date and your password is current. Files may be uploaded at any time prior to submission.

File size may impact the uploading and downloading speed and may lead to browser time-outs, resulting in failed upload/download attempts. Please consider this dependency when attaching very large documents.

OFFEROR INSTRUCTIONS TO SUBMIT IN BIDBUY

Create Quote:

|  |  |
| --- | --- |
| General Tab | : Save and Continue |
| Items Tab | Follow instructions in the Pricing section of the solicitation document as to whether pricing will be entered in the Unit Cost of the Items Tab or submitted as a separate Pricing Document in the Attachments Tab.  Note: any pricing entered in the Unit Cost of the Items Tab will be locked until after Technical Evaluations take place. Do **not** enter cost, pricing, or any discount information in the Alternate Description field. **Entering cost, pricing or discount information in the Alternate Description may result in disqualification.** |
| Terms and Conditions Tab | : Select “Yes”, “No”, or “Yes with Exceptions”  Note: If taking any exceptions to Standard Terms and Conditions an offeror must submit a redline version of the Standard Terms and Conditions with their proposal. |
| Attachments Tab | For each required quote attachment listed:  : “Upload” (next to each required attachment)  : “Choose File”  Note: If a pricing document is required, mark the box next to the question, “Does this attachment contain any pricing, cost, or discount information?”  **Failure to mark this box when attaching a pricing document will result in disqualification.**  **Check this box ONLY if a separate pricing document is required.**  **Do NOT check this box for any other required quote attachment such as the Technical Proposal, Vendor Disclosure / IPG Active Registered Vendor Disclosure, or Utilization Plan(s), or Offer.** |
| Summary Tab | : “Submit Quote” |

Offerors may also view the “Request for Proposal (RFP) Vendor Submission Instructions Video found at <https://cpo-general.illinois.gov/vendor-resources.html>

* 1. DUE DATE AND TIME FOR SUBMISSION OF OFFERS

Each solicitation contains the Offer due date and time, appearing as the “Bid Opening Date:” on the BidBuy posting. Offeror shall submit Offers in BidBuy, and the State shall open Offers electronically in BidBuy on the “Bid Opening Date”. The Offer must remain firm for 180 days from opening.

* 1. CONFLICT BETWEEN INFORMATION IN ELECTRONIC DOCUMENTS AND ON BIDBUY

If the State provides information in electronic documents (i.e., the RFP and other attachments) that is different or in conflict with the information the State provides on BidBuy, then the information in electronic documents is presumed to represent the State’s intent. If the Offeror provides information in electronic documents that is different or in conflict with the information the Offeror provides in BidBuy through their Seller Account, then the information in electronic documents shall represent the Offeror’s intended submission.

* 1. PUBLISHED PROCUREMENT INFORMATION

The State publishes procurement information, including solicitations, awards, and amendments, on the Chief Procurement Officer for General Services’ Illinois Procurement Bulletin, known as the Bulletin or BidBuy (<https://www.bidbuy.illinois.gov/bso/>). Procurement information may not be available in any other form or location. Offeror is responsible for monitoring BidBuy. The State will not be held responsible if Offeror fails to receive the optional e-mail notice of future amendments to the solicitation.

* 1. INFORMATION CONTACT

The individual listed in the “Info Contact:” field on the BidBuy posting shall be the single point of contact for this solicitation. Unless otherwise directed, Offeror should only communicate with the Information Contact. The State/Agency shall not be held responsible for information provided by or to any other person.

Suspected errors should be immediately reported to the Information Contact. Do not discuss, directly or indirectly, the solicitation or any Offer with any State officer or employee other than the Information Contact.

* 1. OFFEROR QUESTIONS AND AGENCY RESPONSE

All questions, other than questions raised at the Pre-Submission Conference, pertaining to this solicitation must be submitted in writing to the Information Contact no later than *ENTER DATE.* Questions received and Agency responses may be posted as a Bid Amendment to the original solicitation on BidBuy; only these posted answers to questions shall be binding on the State. Offeror is responsible for monitoring BidBuy and BidBuy email notifications.

* 1. PRE-SUBMISSION CONFERENCE

The Agency may conduct a Mandatory or Non-Mandatory Pre-Submission Conference, listed in the “Pre-Bid Conference:” field of the BidBuy posting. Please refer to BidBuy for this information.

If attendance is mandatory, Offeror (current contractor included) will be disqualified and considered non-responsive if Offeror does not attend, is not on time, leaves early, or fails to sign the attendance sheet. Offeror must allow adequate time to accommodate security screenings at the site.

*Add Webex information here if needed*

* 1. SMALL BUSINESS SET-ASIDE

In the Bulletin posting, if “Yes” is shown to the question “Is this a Small Business Set-Aside Procurement?”, then Offeror must be registered by the Illinois Small Business Set-Aside Program at the time Offers are due for the Offer to be evaluated. For requirements on qualifying Offeror’s business in the Small Business Set-Aside Program, please go to the Chief Procurement Office for General Service’s website at <https://cpo-general.illinois.gov/sell-2-illinois.html> .

* 1. BUSINESS ENTERPRISE FOR MINORITIES, WOMEN, AND PERSONS WITH DISABILITIES ACT PARTICIPATION AND UTILIZATION PLAN

The BidBuy posting indicates whether this solicitation contains a goal to include businesses owned and controlled by minorities, women, and persons with disabilities. If this solicitation contains a goal, then failure to complete and submit a Utilization Plan, including documentation demonstrating good faith efforts when requesting a waiver, shall render the Offer non-responsive. 30 ILCS 575/4(e). All questions regarding the subcontracting goal must be directed to the Information Contact indicated in BidBuy no later than [*insert question due date from C.6*]. See the Utilization Plan for NIGP codes used to establish this goal.

BEP Goal: *X%*

Go to <https://cei.illinois.gov/vendor-resources/get-bep-certified.html> for complete requirements for BEP certification. Go to State of Illinois Commission on Equity and Inclusion at <https://supplierdiversitymanagementportal.illinois.gov/home.aspx> to search for certified BEP vendors.

* 1. VETERAN SMALL BUSINESS PARTICIPATION AND UTILIZATION PLAN

The BidBuy posting indicates whether this solicitation contains a goal to include businesses owned and controlled by military veterans. If this solicitation contains a goal, then failure to submit a Utilization Plan as instructed later in this solicitation may render the Offer non-responsive. All questions regarding the subcontracting goal must be directed to the Information Contact indicated in BidBuy no later than [*insert question due date from C.6*]. See the Utilization Plan for NIGP codes used to establish this goal.

VBP Goal: *X%*

Go to [https://cei.illinois.gov/programs0/veterans-business-program.html](https://cei.illinois.gov/programs0/veterans-business-program.html%20) for complete requirements for Veteran Owned Small Business (VOSB) or Service-Disabled Veteran Owned Small Business (SDVOSB) certification. Go to State of Illinois Commission on Equity and Inclusion at <https://supplierdiversitymanagementportal.illinois.gov/home.aspx> to search for certified VOSB and SDVOSB vendors.

* 1. SECURITY

Bid/Performance Bond: $*Enter amount or N/A*. If a bond is required, Offeror must submit the Bid Bond with your offer or Performance Bond to the Information Contact within ten (10) days after contract execution. The bond must be from a surety licensed to do business in Illinois. An irrevocable letter of credit is an acceptable substitute. The form of security must be acceptable to the State.

* 1. TERMS AND CONDITIONS

Standard Terms and Conditions will become a part of any resulting contract. To view the Standard Terms and Conditions, please go to

<https://cpo-general.illinois.gov/solicitation-and-contract-templates.html>.

1. EVALUATION PROCEDURES
   1. EVALUATION PROCESS

The State assesses each Offer for Responsibility (E.10) and Responsiveness. The State considers the information provided and the quality of that information when assessing Offers. If the State finds a failure or deficiency, the State may reject the Offer or reflect the failure or deficiency in the assessment.

There are three scored parts to each proposal – technical, commitment to diversity, and pricing. Each part of the proposal is evaluated and ranked independently of the other parts of the proposal. The results of the evaluation of all three parts shall be used in ranking the proposals.

The State may award to the most responsive and responsible offeror whose offer best meets the specified criteria.

* 1. RESPONSIVENESS

A responsive offeror is one who submits an offer that conforms in all material respects to the Request for Proposal and includes all required forms.

* + 1. The State will determine whether the Offeror complied with the instructions for submitting offers. Except for late submissions, and other requirements that by law must be part of the submission, the State may require that an Offeror correct deficiencies as a condition of further evaluation.
    2. Subcontractor Disclosure: If the Offer includes any subcontractors, then Offeror shall complete the Subcontractor Disclosure section of the Offer to the State of Illinois.
    3. If completing IPG Active Registered Vendor Disclosure, then responsiveness may include and may not be limited to:
* Active Illinois Procurement Gateway registration # with expiration date
* Certifications timely to this solicitation
* Disclosure of lobbyists for Offeror and parent entity(ies)
* Disclosure of pending and current contracts
  + 1. If completing Vendor Disclosure, required parts may include and may not be limited to:

• Business and Directory Information: Offeror should complete and return the Business and Directory Information form in Vendor Disclosure, Part 1.

• Illinois Department of Human Rights (IDHR) Public Contracts Number: Offeror shall complete and return the IDHR Public Contracts Number form in Vendor Disclosure, Part 2.

• Authorized to Transact Business or Conduct Affairs in Illinois: A person (other than an individual acting as a sole proprietor) must be a duly constituted legal entity prior to submitting an Offer and authorized to transact business or conduct affairs in Illinois prior to execution of the contract. For more information, see Authorized to Transact Business or Conduct Affairs in Illinois in Vendor Disclosure, Part 3.

• Standard Illinois Certifications: Offeror shall complete and return the Standard Illinois Certifications form in Vendor Disclosure, Part 4.

• State Board of Elections Registration: Offeror may be prohibited from making political contributions and be required to register with the State Board of Elections. For more information, see State Board of Elections in Vendor Disclosure, Part 5.

• Disclosure of Business Operations with Iran: Offeror should complete and return the Disclosure of Business Operations with Iran form in Vendor Disclosure, Part 6.

• Financial Disclosures and Conflicts of Interest: Offeror shall complete and return the Financial Disclosures and Conflicts of Interest form in Vendor Disclosure, Part 7.

• Taxpayer Identification Number: Offeror should complete and return the Taxpayer Identification form in Vendor Disclosure, Part 8.

* + 1. The State will determine whether the Offer meets the stated Technical requirements. Minor differences or deviations that have negligible impact on the price or suitability of the supply or service to meet the State’s needs may be accepted or corrections allowed. If no offeror meets a particular Technical requirement, the State may waive that requirement.
    2. When the specification calls for “Brand Name or Equal,” the brand name product is acceptable. Other products will be considered with proof that the other product meets stated specifications and is equivalent to the brand product in terms of quality, performance, and desired characteristics.
  1. EVALUATION METHODOLOGY

The Technical Requirements are described in Sections F.2., F.3., F.5, and F.6. The State evaluates the Technical Requirements without consideration of price.

* + 1. Total Number of Points Available for Technical Requirements is: *ENTER TECHNICAL POINTS HERE.*
    2. Offeror shall complete and return Sections F.2., F.3.
    3. Relative Weight in Point Format

|  |  |
| --- | --- |
| **Technical Requirements** | **Points Available** |
| Mandatory Requirements with Evidence | 0; all must be met and are evaluated as pass or fail |
| *Project Management Technical Proposal (Desirable elements)* | *Enter point value* |
| *Proposed Technical Solution (Desirable elements)* | *Enter point value* |
| *Demonstration (if not applicable agency to remove)* | *Enter point value* |
|  |  |

* 1. COMMITMENT TO DIVERSITY ELEMENTS

Sections 20-15 and 35-30 of the Illinois Procurement Code (30 ILCS 500/) require offerors to be evaluated on their commitment to diversity. The points available for Commitment to Diversity are described in Section F.4. and are equivalent to 20% of the Technical Requirements points. The State evaluates Commitment to Diversity without consideration of price.

* + 1. The total number of points for Commitment to Diversity is *ENTER HERE*.
    2. Offeror shall complete and return Section F.4 Commitment to Diversity
    3. Commitment to Diversity Categories: The percentages at the end of each section reflect the weighted distribution of points available identified in D.4.1.

|  |
| --- |
| **Commitment to Diversity Categories** |
| Category 1 – BEP Compliance - Whether or how well the Offeror meets this solicitation’s goal of contracting or subcontracting with businesses owned by women, minorities, or persons with disabilities. 5% |
| Category 2 – Subcontracting/Contracting with any WMD businesses (not limited to BEP vendors) - Whether the Offeror assisted businesses owned by women, minorities, or persons with disabilities. 10% |
| Category 3 – Diversity, Equity and Inclusion (DEI) Spend – Offeror’s percentage of business, education and/or community spend from prior calendar year gross revenue that involves businesses owned by women, minorities and/or persons with disabilities. The assisted businesses are not required to be certified in the Illinois Business Enterprise Program. 20% |
| Category 4 – DEI Time - Offeror’s hours spent in the prior calendar year on promoting DEI in the workplace, the community, education institutes, or supporting businesses owned by women, minorities, or persons with disabilities. The assisted business is not required to be certified in the Illinois Business Enterprise Program. The success or failure of each event does not impact the points achieved. The event may be voluntary or paid time. 20% |
| Category 5 – DEI Policies - Entity has provided a written copy of, or link to, their current written workforce diversity, equity, and inclusion policy. Policies must be actionable plans, not overarching concepts around DEI. 10% |
| Category 6 – Diversity in Staffing - % of individuals on governing board and/ or Senior executives out of all staff who identify as women, minorities or person with disabilities. 10%  % of individuals in management /supervisor positions out of all staff who identify as women, minorities or person with disabilities. 13%  % of total staff who identify as women, minorities or person with disabilities. 12% |

* 1. MINIMUM REQUIRED POINTS *Remove section if there is not a minimum level of points required*

Requests for Proposal may specify that offerors must receive a minimum number of points in their Technical and Commitment to Diversity proposals combined to be considered for price evaluation and award.

The State determines how well offers meet the Technical and Commitment to Diversity requirements and rank the offers from best to least qualified using a point ranking system (unless otherwise specified) as an aid in conducting the evaluation. Offerors who receive fewer than the minimum required points will not be considered for price evaluation and award.

* + 1. The total number of available points for Technical and Commitment to Diversity is *ENTER HERE.*
    2. A minimum of *ENTER HERE* of the available (Technical and Commitment to Diversity) points is required to be eligible for demonstrations. *Remove this section if there are no demonstrations or minimum point requirement for demonstrations.*
    3. A minimum of *ENTER HERE* of the available (Technical and Commitment to Diversity) points is required for price evaluation and award consideration. *Remove this section if there is not a minimum point requirement for price evaluation and award.*
  1. PRICE

The State opens Price proposals after evaluating all Technical and Commitment to Diversity proposals.

If the State does not consider the price to be fair and reasonable and negotiations fail to meet an acceptable price, the State reserves the right to cancel the award and take appropriate action to meet the needs of the State. The State determines whether the price is fair and reasonable by considering the offer, including the offeror's qualifications, the offeror's reputation, all price proposals submitted, other known prices, the project budget, and other relevant factors.

* + 1. The total number of points for Price is *ENTER HERE*.
    2. The State will determine Price points using the following formula:

Maximum Price Points X (Lowest Price/Offeror’s Price) = Total Price Points

* 1. MAXIMUM AVAILABLE POINTS

The maximum number of points is *ENTER HERE* (Technical) + *ENTER HERE* (Commitment to Diversity) + *ENTER HERE* (Price) = *ENTER HERE* maximum available points.

1. ADMINISTRATIVE REQUIREMENTS
   1. GOVERNING LAW AND FORUM

Illinois law and rules govern this solicitation and any resulting contract. Offeror must bring any action relating to this solicitation or any resulting contract in the appropriate court in Illinois. This document contains statutory references designated with “ILCS”. To view the full text, go to <http://www.ilga.gov/legislation/ilcs/ilcs.asp> . The Illinois Procurement Code (30 ILCS 500) and the Standard Procurement Rules (44 ILL. ADM. CODE PART 1) are applicable to this solicitation. To view them respectively, go to [http://www.ilga.gov/legislation/ilcs/ilcs5.asp?ActID=532&ChapterID=7)](http://www.ilga.gov/legislation/ilcs/ilcs5.asp?ActID=532&ChapterID=7)%20%20) and

<https://www.ilga.gov/commission/jcar/admincode/044/044parts.html>

* 1. PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT

Offers become the property of the State. All offers will be open to the public under the Illinois Freedom of Information Act (FOIA) (5 ILCS 140) and other applicable laws and rules, unless Offeror requests in its Offer that the State treat certain information as confidential. A request for confidential treatment will not supersede the State’s legal obligations under FOIA. The State will not honor requests to keep entire Offers confidential. Offerors must show the specific grounds in FOIA or other law or rule that support confidential treatment. Regardless, the State will disclose the successful Offeror’s name, the substance of the Offer, and the price.

If Offeror requests confidential treatment, Offeror must submit additional copy/copies (see Instructions for Submission of Offers in Section C.) of the Offer with proposed confidential information redacted. This redacted copy must tell the general nature of the material removed and shall retain as much of the Offer as possible. In a separate attachment, Offeror shall supply a listing of the provisions identified by section number for which it seeks confidential treatment and identify the statutory basis or bases under Illinois law, including a detailed justification for exempting the information from public disclosure.

Offeror will hold harmless and indemnify the State for all costs or damages associated with the State defending Offeror’s request for confidential treatment. Offeror agrees that the State may copy the Offer to facilitate evaluation, or to respond to requests for public records. Offeror warrants that such copying will not violate the rights of any third party.

* 1. MINORITY CONTRACTOR INITIATIVE

The State requires a fee of $15 to cover expenses related to the administration of the Minority Contractor Opportunity Initiative. Any offeror awarded a contract of $1,000 or more under Section 20-10, 20-15, 20-25 or 20-30 of the Illinois Procurement Code (30 ILCS 500) is required to pay a fee of $15. The Comptroller shall deduct the fee from the first check issued to the Vendor under the contract and deposit the fee in the Comptroller’s Administrative Fund. 15 ILCS 405/23.9.

* 1. FEDERAL FUNDS

The resulting contract may be partially or totally funded with Federal funds. Upon notice of intent to award, the percentage of supplies and/or services involved that are Federally funded and the dollar amount of such Federal funds will be disclosed.

* 1. EMPLOYMENT TAX CREDIT

Offerors who hire qualified veterans and certain ex-offenders may be eligible for tax credits. 30 ILCS 500/45-67 and 45-70. Please contact the Illinois Department of Revenue (217-524-4772) for information about tax credits [35 ILCS 5/216, 5/217].

* 1. RESERVATIONS

Offeror must read and understand the solicitation and tailor the Offer and all activities to ensure compliance. The State reserves the right to amend the solicitation, reject any or all offers, award by item/services, group of items/services, or grand total, and waive minor defects. The State may request a clarification, inspect Offeror’s premises, interview staff, request a presentation, or otherwise verify the contents of the Offer, including information about subcontractors and suppliers. The State may request Best & Final Offers when appropriate. The State will make all decisions on compliance, evaluation, and terms and conditions, and shall make decisions in the best interests of the State and in accordance with the Illinois Procurement Code, rules and other applicable State and Federal statutes and regulations. This competitive process may require that Offeror provide additional information and otherwise cooperate with the State. If an offeror does not comply with requests for information and cooperate, the State may reject the offer as non-responsive to the solicitation. Submitting an offer does not entitle Offeror to an award or a contract. Posting a vendor’s name in a Bulletin notice does not entitle the vendor to a contract. The State is not responsible for and will not pay any costs associated with the preparation and submission of any offer.

Awarded Offeror(s) shall not commence and will not be paid for any billable work undertaken prior to the date all parties execute the contract, unless approved in writing in advance by the State Purchasing Officer or the Chief Procurement Officer (or designee).

* 1. AWARD

The State is not obligated to award a contract pursuant to this solicitation. If the State issues an award, the award will be made to the responsive and responsible offeror whose offer best meets the specified criteria unless otherwise permitted by the Illinois Procurement Code and Illinois Administrative Code. However, if the State does not consider the price to be fair and reasonable and negotiations fail to meet an acceptable price, then the State reserves the right to cancel the award and take appropriate action to meet the needs of the State. The State will determine whether the price is fair and reasonable by considering the offer, including the offeror's qualifications, the offeror's reputation, all prices submitted, other known prices, the project budget and other relevant factors. The State will post a notice to the Bulletin identifying the apparent most responsive and responsible offeror.

* 1. INVOICING ADDRESS

The awarded Vendor shall invoice at the completion of the contract unless invoicing is tied in the contract to milestones, deliverables, or other invoicing requirements agreed to in the contract. The Bulletin posting contains the “Bill-to Address:” where invoices should be sent.

Vendor shall not bill for any taxes unless accompanied by proof that the State is subject to the tax. If necessary, Vendor may request the applicable Agency’s Illinois tax exemption number and Federal tax exemption information.

* 1. PROTEST REVIEW OFFICE

Offeror may submit a written protest to the Protest Review Office following the requirements of the Standard Procurement Rules. 44 ILL. ADM. CODE 1.5550. For protests related to specifications, the Protest Review Office must physically receive the protest no later than fourteen (14) days after the solicitation or related addendum was posted to the Bulletin. For protests related to rejection of individual proposals or awards, the protest must be received by close of business no later than fourteen (14) days after the protesting party knows or should have known of the facts giving rise to the protest. The Protest Review Office’s information is as follows:

Chief Procurement Office

Attn: Protest Review Office

Email: [cpogs.pro@illinois.gov](mailto:cpogs.pro@illinois.gov)

* 1. RESPONSIBILITY

A responsible Offeror is one who has the capability in all respects to perform fully the contract requirements and who has the integrity and reliability that will assure good faith performance. The State determines whether the Offeror is a “responsible” offeror; an offeror with whom the State can or should do business. For example, the State may consider the following:

* + 1. A “prohibited bidder” includes any person assisting an employee of the State of Illinois by reviewing, drafting, directing, or preparing any invitation for bids, a request for proposal, or request of information, or providing similar assistance unless such assistance was part of a publicly issued opportunity to review drafts of all or part of these documents. For purposes of this section, an employee of the State of Illinois means one who, by the nature of his or her duties, has the authority to participate personally and substantially in the decision to award a State contract. No person or business shall submit specifications to a State agency unless requested to do so by an employee of the State. No person or business that contracts with a State agency to write specifications for a particular procurement need shall submit a bid or proposal or receive a contract for that procurement need.

Nothing herein is intended to prohibit a vendor from bidding or offering to supply developing technology, supplies or services after providing the State with a demonstration of the developing technology, supplies, or services; provided the subject of the demonstration to the State represents industry trends and innovation and is not specifically designed to meet the State's needs. Nothing herein is intended to prohibit a person or business from submitting a bid or offer or entering into a contract if the person or business: (i) initiates a communication with an employee to provide general information about products, services, or industry best practices and, if applicable, that communication is documented in accordance with Section 50-39 of the Illinois Procurement Code or (ii) responds to a communication initiated by an employee of the State for the purposes of providing information to evaluate new products, trends, services, or technologies.

* + 1. Other factors that the State may use to evaluate to determine responsibility include, but are not limited to: political contributions, certifications, conflict of interest, financial disclosures, taxpayer identification number, past performance in business or industry, references (including those found outside the Offer), compliance with applicable laws, financial responsibility, insurability, effective equal opportunity compliance, payment of prevailing wages if required by law, capacity to produce or sources of supply, and the ability to provide required maintenance service or other matters relating to the offeror’s ability to deliver in the quality and quantity within the time and price as specified in this solicitation.
    2. Awarded offerors must always have financial resources sufficient, in the opinion of the State, to ensure performance of the contract and must provide proof upon request. The State may require a performance bond if, in the opinion of the State, it ensures performance of the contract. The State may terminate the contract, consistent with the termination for cause provision of the contract, if the vendor lacks the financial resources to perform under the contract.
    3. The State may require that an offeror correct any deficiencies as a condition of further evaluation.
  1. BidBuy Terminology and Guidance: BidBuy is an online e-procurement system. There may be some difference between the procurement terminology used in this solicitation and the terms used in BidBuy. Please learn more about BidBuy by accessing the online resources found here:

<https://www2.illinois.gov/cpo/PathwayToProcurement/Pages/Guides-and-Manuals.aspx>

1. PROPOSAL FORMS

Offeror must complete and return:

* The following three (3) tables include: Contract Requirements (Section F.1), and Technical Requirements: Mandatory Requirements with Evidence (Section F.2), and Proposed Technical Solution (Section F.3)
* Commitment to Diversity (Section F.4)
* Offer to the State of Illinois Remove if an IT Procurement
* Offer to the State of Illinois Information and Technology Remove if not an IT Procurement

Please read and follow each instruction carefully.

* 1. CONTRACT REQUIREMENTS

Please read each contract requirement carefully in F.1. These contract requirements shall be included in any contract resulting from this solicitation.

|  |  |
| --- | --- |
| **CONTRACT REQUIREMENTS** |  |
| 1. *Enter contract requirements, these contract requirements shall be included in any contract resulting from this solicitation.* | |

By submitting an offer to this solicitation. The offeror agrees that will meet the contract requirements in Section F.1.

* 1. MANDATORY REQUIREMENTS WITH EVIDENCE

Please check “Met” to each of the mandatory requirements for the proposed solution. An Offeror that does not provide substantiating evidence for each requirement will be disqualified and the rest of the proposal will not be scored.

These Mandatory Requirements shall be included in any contract resulting from this solicitation.

Please provide substantiating evidence in your Proposed Technical Solution. Use the column on the right to indicate the section and page number where your evidence/response to each item may be found. The State will evaluate Offeror’s evidence/response to verify the mandatory requirement is met.

| **MANDATORY REQUIREMENTS WITH EVIDENCE** |  | **Proposal Section and Page Number** |
| --- | --- | --- |
| 1. *Enter mandatory requirements that the Offeror must explain how they meet that requirement. These requirements will be evaluated as pass/fail or Met/Not met.* | Met |  |

* 1. PROPOSED TECHNICAL SOLUTION – DESIRABLE ELEMENTS

Please explain how your organization meets or will meet each of the desirable elements. Use the column on the right to indicate the section and page number of your proposal where your response to each item may be found.

| ***PROPOSED TECHNICAL SOLUTION – DESIRABLE ELEMENTS*** | **Point Value** | **Proposal Section and Page Number** |
| --- | --- | --- |
| 1. ***Experience*** *–* | *Enter Point Value* |  |
| 1. ***Project Team*** *–* | *Enter point value* |  |
| 1. ***Project Plan*** – | *Enter point value* |  |

* 1. COMMITMENT TO DIVERSITY

Commitment to Diversity Vendor Guidance including Vendor Submission Forms are located on the Chief Procurement Officer for General Service’s website at

<https://cpo-general.illinois.gov/commitment-to-diversity/c2d-guidance.html> and on the BidBuy posting under “File Attachments:”

* 1. DEMONSTRATIONS

*Agency to provide special instructions regarding demonstrations. This may include a minimum number of points to move on to demonstrations. Notice to Offerors to schedule demonstrations will be sent out with XX days advanced notice with further details, (Details would include location, Webex information and time limits)*

| **DEMONSTRATIONS** | **Point Value** |
| --- | --- |
| F.5.1 *Agency to enter each topic that will be scored during demonstrations. What does the agency want to see?* | *Enter Point Value* |

* 1. PRICING
     1. FORMAT OF PRICING:
        1. Offeror shall submit pricing in the Quote Items Tab on BidBuy, based on the terms and conditions set forth in this Request for Proposal Solicitation Document. Offeror’s price offer shall serve as the basis for the compensation terms of the resulting contract. Failure to submit pricing in the Items Tab on BidBuy may render Offeror’s entire Offer non-responsive and ineligible for award. Note: any pricing entered in the Unit Cost of the Items Tab will be locked until after Technical and Commitment to Diversity Evaluations are complete.  Do **not**enter cost, pricing, or any discount information in the Alternate Description field. **Entering cost, pricing or discount information in the Alternate Description may result in disqualification.**
        2. Offeror shall submit pricing via the attachments tab in BidBuy, utilizing the agency provided form for pricing. Offeror shall upload pricing under the “Required Documents” section of the Attachments tab and check the box "Does the attachment contain any pricing, cost or discount information?" Failure to check this box allows your pricing to be viewed when bids are opened and may result in disqualification of your offer.
     2. TYPE OF PRICING: The Illinois Office of the Comptroller requires the State to indicate whether the contract pricing is firm or estimated at the time it is submitted for obligation. Pricing pursuant to this contract is *Choose an item.*.
     3. EXPENSES ALLOWED: Expenses *Choose an item.* allowed as follows*: ENTER TEXT*
     4. TAXES: Pricing shall not include any taxes unless accompanied by proof the State is subject to the tax. If necessary, Offeror may request the applicable agency’s Illinois tax exemption number and federal tax exemption information.
     5. OFFEROR’S PRICING OFFER: Enter pricing in the line items of BidBuy. *Rephrase if pricing is an attachment.* 
        1. Renewal Compensation: If the contract is renewed, the price shall be at the same rate as for the initial term unless a different compensation or formula for determining the renewal compensation is stated in this section.
           1. Agency Formula for Determining Renewal Compensation: *Enter Here*
           2. Renewal compensation will be entered by the State prior to execution of the contract.

1. ATTACHMENTS AND EXHIBITS

*Add attachments or exhibits mentioned in Sections A & B*

*Agency may attach Agency specific terms and conditions or federal requirements here.*