

<p style="text-align: center;">SPECIAL INSTRUCTIONS TO OFFERORS SOLICITATION NO: ADHS12-00001132</p>
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A. Pre-Offer Conference:

Prospective Offerors are invited to attend a Pre–Offer Conference. The date, time and location of this conference are indicated on the solicitation cover sheet. The purpose of this conference will be to clarify the contents of this request for proposals in order to prevent any misunderstanding of the ADHS's position. Any doubt as to the requirements of this Request for Proposals (RFP) or any apparent omission or discrepancy should be presented to the ADHS at this conference. The ADHS will then determine the appropriate action necessary, if any, and may issue a written amendment to the request for proposals. Oral statements or instructions shall not constitute an amendment to this request for proposals.

B. Proposal Requirements:

One electronic copy of the proposal shall be submitted in the ProcureAZ e-procurement system as attachments in the acceptable format specified below. Acceptable formats include .doc document (Microsoft Word 2000, XP, or 2003), xls spreadsheet (Microsoft Excel 2000, XP, or 2003) and .pdf (Adobe Acrobat portable documents format).

The responses shall be typed using a 12-point font and single spaced. Each proposal shall include an attachment for each response section. The material should be in sequence and organized as outlined below and related to the RFP. Failure to include the requested information may have a negative impact on the evaluation of the Offeror's proposal. Offerors shall copy ProcureAZ Attachments to their own computer, save the information entered, and submit the completed information as a new, appropriately re-named Attachment in ProcureAZ. ProcureAZ will not save information entered directly on the Attachments. On each document, insert a Footer that specifies: Name of the Offeror, Name of the Attachment, the Solicitation Number, and Page Number.

The ADHS will not provide any reimbursement for the cost of developing in response to this RFP. The Offer shall include at least the following information:

1. Under the "General Tab" in ProcureAZ provide in the "Info Contact" text box complete contact information that includes the following:
 - 1.1 Contact name for individual to be contacted should ADHS have questions related to the submitted response,
 - 1.2 Complete mailing address information,
 - 1.3 Complete e-mail contact information, and
 - 1.4 Telephone contact information.
2. Table of Contents: The Offeror shall provide page numbers for each section of the proposal and the entire proposal shall be sequentially numbered.
3. Attachment One (1), Signed Offer and Acceptance to be signed by authorized person. **(Refer to Part 6: Print, sign, upload and attach).**
4. Complete Attachment Two (2), Notices and Correspondence **(Refer to Part 6: Print, upload and attach).**
5. Complete item pricing in the ProcureAZ item tab. For items offered at no charge select and check the "**no charge**" option per line item and provide an alternate description, if necessary. Using the "**no charge**" option ensures that the Bidder is providing a response to a specific item yet is not charging for that line item. Leaving an item blank or using a zero (0) dollar amount generates a "**No Bid**" for the item.
6. Executive Summary: A brief overview of the project as described in the Method of Approach. The Executive Summary shall be no more than two (2) pages.

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7. Experience and Expertise:

- 7.1 Key requirements for the Offeror include, but are not limited to, WIC or SNAP EBT, as defined in Scope of Work (SOW); offline and online technology experience and each must be technology neutral to minimize bias;
- 7.2 The Offeror would ideally have at least three (3) years of WIC EBT or SNAP EBT experience providing system planning or implementation services of a comparable scope within the last five (5) years;
- 7.3 Description of Offerors's experience and expertise regarding the services offered, company history, location, number of years in business, types of services provided, and number of full and part-time employees;
- 7.4 Current resumes or curriculum vitae for key personnel responsible for delivery of services. Provide resumes for existing staff that will be part of the project and job descriptions for positions to be filled. Resumes shall include name, title, key responsibilities and previous experiences that are relative to that field. Include all professional licensure, certifications, experience, educational preparation, professional awards and publications. Describe staff accountabilities and expertise. List how much time each person will spend on the project.

7.4.1 Resumes should include the following:

- 7.4.1.1 The individual's previous experience in completing each similar contract;
 - 7.4.1.2 Beginning and ending dates for each similar contract;
 - 7.4.1.3 A description of the contract demonstrating how the individual's work on the completed contract relates to the individual's ability to contribute to successfully providing the services required by this RFP; and
 - 7.4.1.4 With respect to each similar contract, the name and address of each reference together with a person to contact for a reference check and a telephone number,
- 7.4.2 The Offeror should provide detailed resumes for each subcontractor's management, supervisory and other key personnel that demonstrate knowledge, ability and experience relevant to that part of the work which the subcontractor is designated to perform.
- 7.4.3 When an Offeror submits resumes, the Offeror shall redact the social security numbers, home addresses, personal telephone numbers and any other personal identifying information other than the individual's name from the resume;
- 7.5 The Offeror shall list all contracts of similar services where a proposal was submitted, but a contract was not awarded;
- 7.6 The Offeror shall list all contracts of similar services it lost within the last five (5) years and explain why; and
- 7.7 The Offeror shall list all WIC EBT or SNAP EBT documents that it has prepared for other State Agencies.

8. Technical Qualifications:

- 8.1 Offerors shall identify a Project Manager who shall be the primary contact person for the ADHS Program Unit Manager in discussing work that needs to be completed. Offerors shall provide a detailed description of the Project Manager's function and how they will accomplish the minimum tasks listed in the SOW.

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9. Organizational Charts

- 9.1 Contract-Specific: The Offeror shall include a contract organization chart, with names showing management, supervisory and other key personnel (including subcontractor management, supervisory or other key personnel) to be assigned to the contract. The chart shall include the labor category and title of each such individual; and
- 9.2 Chart for Entire Firm: The Offeror should include an organization chart showing the Offeror's entire organizational structure. This chart should show the relationship of the individuals assigned to the contract to the Offeror's overall organizational structure.

10. Method of Approach (Methodology)

- 10.1 The Offeror shall prepare and submit a written narrative describing the method of approach that will be used to provide the services to perform the tasks as described in the SOW. Written narratives shall not exceed five (5) pages, excluding attachments; and
- 10.2 Submit examples of previous projects completed within the last three (3) years with activities similar to those described in this solicitation, a description of the work performed, the approach used to complete the project, recommendations made to the clients and the project outcome. The ADHS may not be used as an example of prior projects.

11. Completed Price Sheet in ProcureAZ Items Tab.

- 11.1 The Offeror shall submit its firm fixed price in the ProcureAZ Items Tab. The firm fixed price that is submitted is all-inclusive of direct cost and indirect costs, including, but not limited to, direct labor costs, overhead, fee or profit, clerical support, equipment, materials, supplies, managerial (administrative) support, all documents, reports, forms, travel, reproduction and any other costs. No additional fees or costs shall be paid by the State unless there is a change in the SOW.
- 11.2 The Offeror shall submit its all-inclusive hourly rates in the ProcureAZ Items Tab. The all-inclusive hourly rates submitted are hourly rates comprised of all direct and indirect costs including, but not limited to: overhead, fee or profit, clerical support, travel expenses, per diem, safety equipment, materials, supplies, managerial support and all documents, forms, and reproductions thereof.

12. References

- 12.1 The Offeror shall provide three (3) references including past similar contracts that support the Offeror's abilities to provide the EBT Planning Services. Use the format on Attachment Three (3). The ADHS or its personnel shall not be provided as a reference. The reference cannot be any person working for any state in the HANDS Consortium; and
- 12.2 The Offeror shall provide a listing of all contracts of similar size and scope that it has successfully completed, as evidence of the Offeror's ability to successfully complete the EBT Planning Services required by this RFP. A description of all contracts shall be included and shall show how each contract relates to the ability of the Offeror to complete the EBT Planning Services required. For each contract, the Offeror shall provide the beginning and end dates of the contract.

C. Notification of Future Action

The Offeror will not be eligible to submit a Proposal for future EBT contracts for the HANDS Consortium, including implementation, in which the Offeror defined the requirements, tasks, or skills as referenced in the USDA 901 Handbook. The USDA 901 Handbook is located at the following web address: http://www.fns.usda.gov/apd/Handbook_901/V_1-4/Chapter_6-Procurement.pdf

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D. Proposal Organization and Requirements:

The Proposal shall be organized in the following order:

2. Table of Contents
3. Offer and Acceptance Form signed by authorized person
4. Acknowledgement in ProcureAZ of any Solicitation Amendments issued, if applicable
5. Executive Summary
6. Experience and Expertise
7. Technical Qualifications
8. Organizational Charts
9. Method and Approach
10. Completed Price Sheet
11. References
12. Other Attachments as applicable

D. Proposal Opening:

Offers received by the due date and time will be opened on ProcureAZ. The name of each Offeror will be publicly available. Offers will not be subject to public inspection until after Contract award.

E. Evaluation Criteria:

In accordance with the A.R.S. § 41-2534, Competitive Sealed Proposals, awards shall be made to the responsible Offeror(s) whose proposal(s) is(are) determined in writing to be the most advantageous to the ADHS based upon the evaluation criteria listed below. The evaluation factors are listed in their relative order of importance.

1. Experience and Expertise;
2. Method of Approach (Methodology);
3. Cost; and
4. Technical Qualifications.

F. Discussion:

In accordance with A.R.S. §41-2534, after the initial receipt of proposals, the ADHS reserves the option to conduct discussions with those Offerors who submit proposals determined by the ADHS to be reasonably susceptible of being selected for award regarding the Contract and the relative methods of approach for furnishing the required services.

G. Confidential Information:

1. If a person believes that a bid, proposal, offer, specification, or protest contains information that should be withheld, a statement advising the procurement officer of this fact and explaining the reasons for confidentiality shall accompany the submission, and the information shall be so identified wherever it appears. The person shall stamp or specifically identify all information the person believes remains confidential.

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2. The information identified by the person as confidential shall not be disclosed until the Director makes a written determination.
3. The Director shall review the statement and information and shall determine in writing whether the information shall be withheld.
4. If the Director determines to disclose the information, the Director shall inform the Offeror in writing of such determination.

H. Inclusive Offerors:

Offerors are encouraged to make every effort to utilize subcontractors that are small, women- and/or minority-owned business enterprises. Offerors who are committing a portion of their work to such subcontractors shall provide the name of the subcontractor, which of the following categories apply: small, women- and/or minority-owned business, the specific services or work to be performed, the percentage of work or services to be provided by the subcontractor, and how this effort will be administered and managed, including reporting requirements.

I. Offshore Performance of Work Prohibited:

Any services that are described in the specifications or scope of work that directly serve the State of Arizona or its clients and involve access to secure or sensitive data or personal client data shall be performed with the defined territories of the United States. Unless specifically stated otherwise in the specifications, this paragraph does not apply to indirect or 'overhead' services, redundant back-up services or services that are incidental to the performance of the Contract. This provision applies to work performed by subcontractors at all tiers. Offerors shall declare all anticipated offshore services in the proposal.

J. Compliance with A.R.S. §41-4401:

By submission of the offer, the Offeror warrants that the Offeror and all proposed subcontractors are and shall remain in compliance with all federal, state and local immigration laws and regulations relating to the immigration status of their employees. The State may, at its sole discretion require evidence of compliance. The Offeror shall have five (5) days from receipt of the request to supply adequate information. Failure to comply with this instruction or failure to supply requested information within the timeframe specified shall result in the offer not being considered for Contract award.

K. Suspension or Debarment:

The State may, by written Notice to the Contractor, immediately terminate any contract awarded under this solicitation if the State determines that the Contractor has been debarred, suspended or otherwise lawfully prohibited from participating in any public procurement activity, including but not limited to, being disapproved as a subcontractor of any public procurement unit or other governmental body. Submittal of an offer or execution of a Contractor shall attest that the Contractor is not currently suspended or debarred. If the Contractor becomes suspended or debarred, the Contractor shall immediately notify the state.

L. Questions:

All questions regarding this solicitation shall be submitted within the ProcureAZ system no later than seven (7) calendar days prior to the RFP due date.