



REQUEST FOR PROPOSALS WIC 15-03

PROJECT TITLE: WIC Staff Training

PROPOSAL DUE DATE: June 18, 2015 3:00 P.M. MOUNTAIN STANDARD (ARIZONA) TIME

EXPECTED PERIOD OF SERVICES: Tentatively July 6, 2015 through September 30, 2016

MINIMUM REQUIREMENTS FOR BIDDING: This bid is open to those organizations that satisfy the following minimum requirements stated herein and who are available for work:

A. Mandatory Experience

The Vendor must have experience creating staff trainings for public health entities.

Bidders who do not meet and demonstrate these minimum qualifications will be rejected and will not receive further consideration. Any bid that is rejected as non-responsive will not be evaluated.

SCHEDULE: ITCA reserves the right to adjust this schedule as it deems necessary, at its sole discretion.

RFP Release Date	May 11, 2015
Questions Due from Bidders	May 22, 2015
ITCA Response to Questions	May 27, 2015
Proposal & References Due	June 18, 2015
Projected Date for Announcement of Apparently Successful Bidder	June 26, 2015
Projected Contract Start Date	July 6, 2015

Upon release of this RFP, all communications in regard to this RFP shall be directed, **in writing**, to the RFP Coordinator named below or their designee.

Verna Monenerkit, Office Manager
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DEFINITIONS:

For the purposes of this solicitation, the following definitions include and have the meanings indicated below:

Apparently Successful Bidder: The Bidder selected as the entity to perform the anticipated services, subject to completion of contract negotiations and execution of a written contract

Bidder: Individual, company, or firm submitting a proposal in order to attain a contract with ITCA - used interchangeably with Vendor.

Business Day: Days of the week excluding weekends and ITCA holidays; namely, New Year's Day, Martin Luther King Jr. Day, President's Day, Memorial Day, Labor Day, Independence Day, American Indian Day (4th Friday of September), Veterans' Day, Thanksgiving day, the day after Thanksgiving day, and Christmas.

Contractor: Individual or company whose proposal has been accepted by ITCA and is awarded a fully executed, written contract.

RFP Coordinator: The contact person at ITCA with whom all communication takes place.

Day: A calendar day, unless specifically stated otherwise.

Firm, Fixed Price – A price that 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 ITCA unless there is a change in the scope of work.

Food and Nutrition Service (FNS): Administers the nutrition assistance programs of the U.S. Department of Agriculture (USDA)

ITCA: The Inter Tribal Council of Arizona is the WIC state agency issuing the RFP.

Letter of Submittal: The cover letter submitted with the proposal.

Local Time: Time in the Mountain Time Zone as observed by the State of Arizona.

Normal Business Hours: Normal business hours are Monday through Friday from 8:00 a.m. to 5:00 p.m. except ITCA Holidays.

Proposal: A formal offer submitted in response to this solicitation.

Proposal Due Date/Time: Proposals are due on the date and at the time specified in the schedule. Any Proposal received at any time after the stated date and time (e.g. 3:01 p.m.) will be considered late and **will not** be evaluated.

Request for Proposals (RFP): Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the consultant community to suggest various approaches to meet the need at a given price.

Schedule: The schedule listed in the RFP.

USDA: United States Department of Agriculture

Vendor: Individual, company, or firm submitting a proposal in order to attain a contract with ITCA - used interchangeably with Bidder.

1. INTRODUCTION

1.1 PURPOSE

The Inter Tribal Council of Arizona, Inc. Special Supplemental Nutrition Program for Women, Infants and Children (WIC) is soliciting proposals from vendors to modify an existing training program or create a new training program for WIC paraprofessional staff.

1.2 BACKGROUND

WIC is a federally funded nutrition program carried out pursuant to provisions of the Child Nutrition Act. WIC is administered by state agencies for the United States Department of Agriculture Food and Nutrition Services (USDA/FNS). ITCA administers WIC for eleven Tribes and one urban Indian health agency and serves approximately 11,000 clients per month through 14 permanent sites and numerous satellite clinics. WIC services include providing checks for client's to redeem at authorized stores, nutrition education and referrals to health and social services.

1.3 FUNDING

It is the intent of ITCA that this RFP act as a true measure of actual costs for accomplishment of the services detailed herein. Therefore, a maximum level of available funding is not being identified at this time. Any contract(s) awarded as a result of this procurement is contingent upon the availability of funding.

The Cost Proposal is a scored requirement. While cost will be a factor in the evaluation of the proposal and selection of the Apparently Successful Bidder, it will not necessarily be the decisive factor. The evaluation process is designed to award this procurement to the Bidder whose overall proposal meets the requirements of the RFP and the needs of the ITCA.

No payments in advance or in anticipation of goods or services to be provided under any resulting contract shall be made. The contractor shall only be compensated for performance delivered and accepted by the ITCA.

2. GENERAL INFORMATION FOR BIDDERS

2.1 RFP COORDINATOR

The RFP Coordinator is the sole point of contact at ITCA for this procurement. Proposals may be delivered by hand or courier service to our physical location.

All communication between the Bidder and ITCA upon receipt of this RFP shall be with the RFP Coordinator or their designee, as follows:

Name	Verna Monenerkit , RFP Coordinator Office Manager
Mailing Address	2214 N. Central Ave.
Street Address	Phoenix, AZ 85004
E-Mail Address	Verna.monenerkit@itcaonline.com

Any other communication will be considered unofficial and non-binding on ITCA. Bidders are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification.

Base your proposal on the material contained in the RFP and any subsequent amendments. Disregard any draft material you may have received and any oral representations by any party.

2.2 BIDDER QUESTIONS & ITCA ANSWERS

1. It is the responsibility of the potential bidders to carefully read, understand, and follow the instructions contained in this solicitation document and all amendments to the solicitation. It is the responsibility of bidders to monitor the ITCA website for any posted amendments.
2. All questions regarding this RFP must be in writing (e-mail) and addressed to the RFP Coordinator. ITCA will only answer questions received no later than 3:00 p.m. local time on the date stated in the SCHEDULE. **DO NOT CALL** the RFP Coordinator to ask questions. Questions will not be individually answered prior to the date scheduled for ITCA responses. Questions received after the date and time stated in the schedule will not be accepted.
3. ITCA reserves the right to respond immediately to any questions from bidders which could determine whether that bidder submits a letter of intent or proposal. Those questions and the response will become part of the official questions and answers.
4. Bidders' questions and ITCA's official written answers will be posted on the ITCA website at www.itcaonline.com/wic. Individual notification from the RFP Coordinator will not be sent to Bidders when responses to questions or amendments are available. They will be posted by the date in the schedule and **must be downloaded from the ITCA site**.
5. Bidders are responsible for checking the website for updates and amendments.

2.3 E-MAIL AND INTERNET COMMUNICATION

You may use mail or e-mail communication for any communication required in this RFP EXCEPT your proposal. ITCA may communicate with you utilizing the same methods. You may **not** send your proposal by facsimile or e-mail communication.

ITCA does not take responsibility for any problems in the facsimile, e-mail, or Internet delivery services, either within or outside ITCA.

2.4 SUBMISSION OF PROPOSALS

Bidders are required to submit three (3) copies of their proposal plus an original. The original must have original signatures. All other copies can have photocopied signatures. Submit one (1) electronic copy of all required information on a CD-RW/CD-ROM in Microsoft Word 2003 or higher. The proposal, whether mailed or hand delivered, must arrive at ITCA no later than 3:00 p.m., local time, on June 18, 2015 3:00 P.M. Mountain Standard- Arizona- Time. Note that Arizona does not participate in daylight savings time.

The proposal is to be sent to the RFP Coordinator at the address noted in Section 2.1. The envelope should be clearly marked to the attention of the RFP Coordinator and include the RFP number.

Bidders mailing proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Bidders assume the risk for the method of delivery chosen. The ITCA assumes no responsibility for delays caused by **any delivery service**. Proposals may not be transmitted using facsimile transmission.

Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of the ITCA and will not be returned.

2.5 ALTERNATIVE PROPOSALS

Each Bidder may submit only one proposal. If you include alternatives within your proposals, or send multiple proposals, ITCA will reject all of your proposals.

2.6 PUBLIC DISCLOSURE

All proposals and materials submitted in response to this RFP shall become the property of ITCA. With the exception of lists of prospective bidders all proposals received shall remain confidential until the contract, if

any, resulting from this RFP is signed by the ITCA and the apparently successful Contractor. Thereafter, the proposal shall be deemed public records.

If a public records request is made for any information in the proposal that the Bidder claims as proprietary/confidential and exempt from disclosure, ITCA will notify the Bidder of the request and of the date that the records will be released to the requester unless the Bidder obtains a court order preventing disclosure. However, this is a courtesy and not an obligation. If the Bidder fails to obtain the court order preventing disclosure, ITCA will release the requested information on the date specified.

ITCA has no obligation to assert an exemption from disclosure. By submitting a Response, the Respondent acknowledges this obligation. The Respondent acknowledges that ITCA will have no obligation or liability to the Respondent if the records are disclosed.

ITCA will charge for copying and shipping any copies of materials requested. ITCA will not charge a fee for inspection of RFP or contract files but twenty-four (24) hours' notice to the RFP Coordinator is required. Address requests for copying or inspecting materials to the RFP Coordinator named in this RFP.

ITCA will retain RFP records in accordance with ITCA Records Retention Schedules.

2.7 PROPRIETARY AND CONFIDENTIAL INFORMATION

Clearly mark every page of any portion(s) of your proposal that contains proprietary/confidential information with the words "PROPRIETARY/CONFIDENTIAL INFORMATION" (in all caps), affixed to the lower right-hand corner of each page. In addition, you must provide a detailed listing (including page numbers) in your Letter of Submittal, of any and all materials so marked. You may not mark the entire proposal as proprietary or confidential. Proposals which are marked in such a manner will be disqualified and removed from consideration. Your cost proposal is not confidential or proprietary. If either is marked as such, your proposal will be disqualified.

2.8 INCORPORATION OF RFP AND PROPOSAL IN CONTRACT

This RFP and the Bidder's response, including all promises, warranties, commitments, and representations made in the successful proposal, shall be binding and incorporated by reference in the ITCA's contract with the successful Bidder. By submitting a proposal, the bidder agrees to abide by the processes set forth in the RFP.

3 PROPOSAL CONTENTS

Proposals **must** contain:

1. A Letter of Submittal, signed by a person authorized to bind your organization to a contract. **Your Letter of Submittal must** include, in the order given:
 - a. Identifying information about your organization and any partnering or subcontracting organizations to include:
 - The business name, mailing and delivery address, telephone number, email address (if any) and fax number.
 - The legal status of the organization (sole proprietorship, partnership, corporation, government, etc.) and the year the entity was organized as it now substantially exists. Organizations claiming status under Section 501(c)(3) of the Internal Revenue Code must provide a copy of the determination letter that recognizes that status.

- The name(s), address(es), email address(es) and telephone number(s) of the sole proprietor, partners or principal officers as appropriate to the organization.
 - A list identifying which parties in the organization have the authority to sign contracts/amendments on behalf of the firm.
 - The name and title of the person who would have primary contact with ITCA in carrying out the responsibilities of this contract.
- b. Legal Name Verification. Many companies use a “Doing Business As” name or a nickname in their daily business. However, ITCA requires the legal name of your company, as it is legally registered. When preparing your proposal, be sure to use the proper company legal name. Your company’s legal name can be verified through the Licensing, Secretary of State’s Office or similar office in the state in which you were established.
- c. Provide your Federal Employer Tax Identification Number.
- d. In the event the Bidder is proposing subcontractors to perform any of the activities detailed in this document, Bidder must provide a list of all proposed subcontractors along with the same information cited above. Be advised that ITCA retains review rights regarding subcontractors and may require copies of all subcontracts related to this project. If subcontracting is not allowed under this solicitation, respond “not applicable”.
- e. If you claim minority-owned and/or women-owned business participation, you must provide your oath that you will meet Minority and Women’s Business Enterprise participation requirements. Name the proposed minority or women-owned business(es) and the percentage and dollar amount of their participation. Proof of Federal certification as a Minority, Women-Owned, or Disadvantaged Business must be provided.
- f. If any of your employees, officers or your subcontractor’s employees or officers were employed by ITCA during the last two years, state their positions within your organization, their proposed duties under any resulting contract, their duties and position during their employment with ITCA, and the date of their termination from employment.

If any owner, key officer or key employee of the Bidder is related by blood or marriage to any employee of ITCA or has close personal relationship to same, identify all the parties, identify their current or proposed positions and describe the nature of the relationship.

If the Bidder is aware of any other real or potential conflict of interest, the Bidder must fully disclose the nature and circumstances of such potential conflict of interest.

If, after review of the information provided and the situation, ITCA determines that a potential conflict of interest exists, ITCA may, at its sole option, disqualify the Bidder from participating in this procurement.

Failure to fully disclose any real or potential conflict of interest may result in the disqualification of the Bidder or the Termination for Default of any contract with the Bidder resulting from this procurement with the Bidder.

- g. Bidders and any partnering or subcontracting organizations must indicate whether they have had a contract terminated for default in the last five years. Termination for Default is defined as a notice to stop work due to the Bidder’s nonperformance or poor performance, where the issue of performance was either not litigated due to inaction on the part of the Bidder, or litigated and determined that the Bidder was in default.

If the Bidder has had a contract terminated for default in the last five years, the Bidder must submit full details including the other party’s name, address, and telephone number. The Bidder must specifically grant ITCA permission to contact any and all involved parties and access any and all information ITCA determines is necessary to satisfy its investigation of

the termination. ITCA will evaluate the circumstances of the termination and may, at its sole discretion, bar the participation of the Bidder in this procurement.

Failure to disclose any terminations for default if discovered post contract award will result in termination of the contract with liquidated damages.

- h. The Contractor, including any of its officers or holder of controlling interest, must certify that they are not presently or have not previously been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any federal contracts or grants by any federal department or agency. Any proposed partnering organizations or subcontractors must provide same certification.
 - i. Your organization and any partnering or subcontracting organizations must provide sufficient information to provide assurance to ITCA that the Bidder is a financially stable, viable organization that will be fully able to meet all of its obligations under any resulting contract. The Bidder must supply as part of their response income statements (summary of revenue and expenses) for a three year period plus the bidder's last audit report. If ITCA determines that the Bidder has not demonstrated its financial stability, ITCA may at its sole option reject the Bidder's proposal as non-responsive. Failure to provide any proof of financial stability will result in automatic disqualification.
 - j. A description of how your company meets the minimum experience requirements of the proposal.
 - k. A detailed list of all materials and enclosures being sent in the proposal.
 - l. A detailed list (including page numbers) of any materials marked as "Proprietary/Confidential".
 - m. A copy of the CERTIFICATIONS AND ASSURANCES, Exhibit B, signed by a person authorized to bind your organization to a contract.
2. Your proposal in response to the TECHNICAL PROPOSAL SPECIFICATIONS, Exhibit C.
 3. Your proposal in response to the COST PROPOSAL SPECIFICATIONS, Exhibit D.

4 PROPOSAL FORMAT

1. Use standard 8.5" x 11" white paper, except that charts, diagrams and the like may be on 11" x 14" fold-outs which, when folded, fit within the 8.5" x 11" format. A font size of 11 point or larger shall be used. All pages, except for those in the submittal and cost envelopes, must be consecutively numbered, starting with page 1 in each of the proposals. The firm name and the page number may be located at the top or bottom as the Bidder prefers, but the location must be consistent throughout.
2. Staple and submit one copy each of the Letter of Submittal and the Certifications and Assurances together.
3. Bind each copy of your proposal separately. Use three ring binders, staples, etc.
4. Send one original clearly marked as the "Original" and three (3) identical copies of your Technical, Management and Cost Proposals. Submit one (1) electronic copy of all required information on a CD-RW CD-ROM in **Microsoft Word 2003** or higher. Ensure that the discs are labeled with the date, RFP title, RFP number, and Bidder's name and packaged with the original copy of the proposal. **Do not submit in .PDF format.**
5. State your organization's name on the first page of all copies of your Proposal.

6. Write your proposal in the order given in the Technical and Cost Proposal Specifications. Title and number your response to each item in the same order it appears in the RFP. You must respond to every section in the specifications except where otherwise stated. Your response must be sufficiently detailed to substantiate that services offered meet the requirements of the Statement of Work. Vendors must respond to each item/paragraph using the same headings as the RFP. Do not respond by referring to other sections of your proposal.
7. Brevity and clarity in your proposal is essential. Be succinct, concrete, and use quantified descriptions whenever possible. There will be no calls made to your organization to clarify information. It is the applicant's responsibility to ensure all of the pages are included in all of the copies and all pages are numbered. Reviewers will not have access to pages that were included in the original, but not in their copies.
8. Proposals should total no more than 20 pages excluding reference forms.

5 GENERAL PROVISIONS

5.1 COSTS OF PROPOSAL PREPARATION

ITCA will not pay any Bidder costs associated with preparing or presenting any proposal in response to this RFP.

5.2 INSURANCE COVERAGE

Prior to contract execution, the Contractor will be required to provide a Certificate(s) of Insurance executed by a duly authorized representative of each insurer showing compliance with the insurance requirements set forth below.

5.2.1 Liability Insurance

1. **Commercial General Liability Insurance:** Bidder shall maintain general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the "each occurrence" limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the "each occurrence" limit. CGL insurance shall be written on ISO occurrence from CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insured's (cross liability) condition.
2. **Professional Liability:** Errors and Omissions coverage with a limit of not less than \$1,000,000 per occurrence and \$2,000,000, aggregate.
3. **Crime Coverage:** Including fraud, forgery, money and securities and employee dishonesty coverage with a per occurrence limit equal to the maximum amount of money and/or securities any employee might have access to at any one time.

Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

4. **Business Auto Policy:** As applicable, the Bidder shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than \$1,000,000 per accident. Such insurance shall cover liability arising out of "Any Auto." Business auto coverage

shall be written on ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

5.2.2 Employers Liability (“Stop Gap”) Insurance:

In addition, the Bidder shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

5.2.3 Additional Provisions:

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The Inter Tribal Council of Arizona, its elected and appointed officials, agents and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the three state agencies.
2. **Cancellation.** The Inter Tribal Council of Arizona shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give ITCA 45 days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, ITCA shall be given 10 days advance notice of cancellation.
3. **Identification.** Policy must reference the contract number and the agency names.
4. **Excess Coverage.** By requiring insurance herein, ITCA does not represent that coverage and limits will be adequate to protect Bidder, and such coverage and limits shall not limit Bidder’s liability under the indemnities and reimbursements granted to ITCA in this contract.

5.2.4 Worker’s Compensation Coverage:

The Bidder will at all times comply with all applicable workers’ compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. ITCA will not be held responsible in any way for claims filed by the Bidder or their employees for services performed under the terms of this contract.

5.3 RECEIPT OF INSUFFICIENT COMPETITIVE PROPOSALS/RESPONSE

If ITCA receives only one responsive proposal as a result of this RFP, ITCA reserves the right to select the Contractor which best meets ITCA’s needs. That Contractor will be selected by ITCA management. The Contractor selected need not be the sole Bidder.

5.4 NON-RESPONSIVE PROPOSALS/WAIVER OF MINOR IRREGULARITIES

Read all instructions carefully. All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. If you do not comply with any part of this RFP, ITCA may, at its sole option, reject your proposal as non-responsive. ITCA reserves the right to waive minor administrative irregularities contained in any proposal.

5.5 RFP AMENDMENTS

ITCA reserves the right to amend this RFP. The published Bidder questions and ITCA’s official answers are an amendment to the RFP.

5.6 RIGHT TO REJECT ALL PROPOSALS

ITCA reserves the right and without penalty to reject, in whole or in part, any or all proposals, to award no contract as a result of this solicitation, to advertise for new proposals, to abandon the need for such services and to cancel or reissue this solicitation prior to execution of a contract if it is in the best interest of ITCA to do so.

5.7 AUTHORITY TO BIND ITCA

The ITCA Executive Director or the Executive Board's designee are the only persons who may legally commit ITCA to the expenditures of funds under any contracts or amendments to the contract resulting from this RFP. The Contractor shall not incur, and ITCA shall not pay, any costs incurred before a contract or any subsequent amendment is fully executed.

5.8 CONTRACT TERMS

The Apparently Successful Bidder(s) will be expected to sign a contract that will incorporate this RFP and the successful proposal.

Either party may propose additional contract terms and conditions during negotiation of the final contract.

If two or more organizations' joint proposal is the apparent successful bidder, **one organization must be designated as the Prime Bidder.** The Prime Bidder will be ITCA's sole point of contact and will bear sole responsibility for performance under any resulting contract.

If the Apparently Successful Bidder(s) refuses to sign the final contract within thirty (30) business days of delivery, ITCA may cancel the selection and award the contract to the next-highest-ranked Bidder(s).

5.9 AVAILABILITY OF FUNDS

ITCA's obligation under any resultant contract is contingent upon the availability of appropriated federal funds from which payment for contract purposes can be made. In the event funds from any source are reduced or withdrawn, or limited in any way, any resultant contract may either be terminated immediately by ITCA or at ITCA's discretion renegotiated within the constraints of the new funding limitations and conditions.

6 EVALUATION AND AWARD PROCEDURES

All incomplete RFP's submitted shall be determined non-responsive and removed from the evaluation process. To be considered complete, RFP's shall include all required submittals, and shall be signed and dated.

Responsive proposals will be evaluated in accordance with the requirements stated in this solicitation and any amendments issued. The evaluation of proposals shall be accomplished by an evaluation team to be designated by ITCA which will determine the ranking of the proposal. Each evaluator will independently review and assign scores to the proposal based upon criteria established in the solicitation.

Your proposal must stand alone. There will be no calls made to your organization to clarify information. It is the Bidder's responsibility to ensure all of the pages are included in all of the copies and all pages are numbered. Reviewers will not have access to pages that were included in the original, but not in their copies. Do not refer evaluators to URLs to find supporting information as evaluators will not have access to a computer during the evaluation.

6.1 INFORMATION USED FOR EVALUATION

Evaluators will use the information in the Bidders' proposals (Technical and Cost). No other information will be supplied to or used by the evaluation teams.

6.2 EVALUATION STEPS

6.2.1 PROPOSAL SCREENING

ITCA will review proposals for compliance with RFP procedural requirements. Non-responsive proposals will be eliminated from further evaluation.

6.2.2 REVIEW OF MANDATORY REQUIREMENTS

Evaluators will determine whether responses to the mandatory requirements are adequate. All requirements of the TECHNICAL PROPOSAL SPECIFICATIONS (Exhibit C) and COST PROPOSAL SPECIFICATIONS (EXHIBIT D) are mandatory requirements.

Proposals that do not meet a mandatory requirement will be rejected as non-responsive unless ITCA determines that it is in its best interest to eliminate that mandatory requirement for all Bidders.

6.2.3 QUALITATIVE REVIEW AND SCORING

Evaluators will score all proposals that pass the review of mandatory requirements. All requirements of the TECHNICAL PROPOSAL SPECIFICATIONS (Exhibit C) and COST PROPOSAL SPECIFICATIONS (Exhibit D) are scored. The evaluators will consider how well each proposal meets the needs of the ITCA. It is important that the proposal be clear and complete, so the evaluators may understand all aspects of the proposal.

6.3 SCORING

Evaluation and Scoring of Proposal Response

An evaluation committee of representatives from the ITCA will judge the merits of proposals received in accordance with the evaluation factors defined in the RFP. Failure of the Bidder to provide any information requested in the RFP may result in disqualification of the proposal and shall be the responsibility of the Bidder. The evaluation process will include a structured review of each section of the response by ITCA evaluation teams.

The distribution of points for each proposal section is provided in the table below.

Preliminary Score	Maximum Score
Requirements/Criteria	
Technical Proposal Specifications	700
Cost	300

6.3.1 COST POINTS

The score for the Cost Proposal is computed by dividing the lowest bid by the amount of the bid in the Bidder's Cost Proposal and multiplying that percentage against the total points available for this section, rounded to the nearest tenth of a point.

Example: Total possible points for cost are 300.
Vendor A's cost is \$20,000.
Vendor B's cost is \$25,000.
Vendor A would receive 300 points,
Vendor B would receive 240 points ($\$20,000/\$25,000 = 80\% \times 300 \text{ points} = 240$).

6.3.2 SUBTOTAL SCORE

The **Subtotal Score** is the score for each component, i.e., Technical and the Cost Score.

6.3.3 FINAL SCORE

The FINAL Score is the sum of the Sub Total Scores.

6.4 ACTION ON EQUIVALENT SCORES

If two or more proposals receive equivalent scores, ITCA may, at its sole discretion, select as apparently successful the Bidder whose proposal is in ITCA's best interest. Equivalent scores are scores separated by three (3.0) or fewer points.

ITCA's best interest will be defined by ITCA and communicated to Bidders with equivalent scores in writing.

6.5 SELECTION OF THE APPARENTLY SUCCESSFUL BIDDER

ITCA will average the Final Scores from reviewers for each Bidder. The Bidder with the highest average **Final Score** will be named the Apparently Successful Bidder, unless scores equivalent to the highest score are received by one or more Bidders. In that case, ITCA may select the Apparently Successful Bidder in the manner stated above.

6.6 NOTICE OF AWARD AND CONTRACT SIGNATURE

ITCA will notify all Bidders who submit a proposal of the selection of the Apparently Successful Bidder.

6.7 DEBRIEFING OF UNSUCCESSFUL BIDDERS

Upon request, a debriefing conference will be scheduled with an unsuccessful bidder. The RFP Coordinator must receive the request for a debriefing conference within three (3) business days after the Notification of Unsuccessful Bidder letter is faxed/e-mailed to the Bidder. The debriefing must be held within three (3) business days of the request.

Discussion will be limited to a critique of the requesting Bidder's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of 30 minutes.

7 PROTEST PROCEDURES

1. Protests may be made only by Bidders who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Bidder is allowed three (3) business days to file a protest of the acquisition with the RFP/RFP Coordinator. Protests must be received by the RFP Coordinator no later than 4:30 PM, local time,

in Phoenix, Arizona on the third business day following the debriefing. ITCA shall not accept any protest before the announcement of the Apparently Successful Bidder.

2. ITCA shall consider only those protests concerning a matter of bias, discrimination or conflict of interest, material errors in tabulation, or material failure to follow procedures stated in the RFP or ITCA policy. Failure to cite the basis of the protest will result in rejection of the protest.
3. Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1). An evaluator's professional judgment on the quality of a proposal, or 2). ITCA's assessment of its own and/or other agencies needs or requirements.
4. Any protests must be written, signed by the protesting Bidder or an authorized representative, and mailed or hand delivered. Telegrams, facsimiles or similar transmittals will not be considered. The protest must state the RFP or RFP number, the grounds for the protest with specific facts and complete statements of the action(s) being protested and any other supporting information on which the protesting party is relying. Address a protest to:

Verna Monenerkit, Office Manager
Inter Tribal Council of Arizona
2214 N. Central Ave.
Phoenix, AZ 85004
verna.monenerkit@itcaonline.com

5. Upon receipt of a valid formal protest, ITCA will conduct a protest review. The purpose of the review is to assure ITCA policy and procedures were followed, all requirements were met and all Bidders were treated equally and fairly. The protest review **will not** contain a review of bids or scores assigned. A written decision regarding the protest will be issued by ITCA.

EXHIBITS and ATTACHMENTS

EXHIBITS:

A – ASSURANCES AND CERTIFICATIONS

B – STATEMENT OF WORK

C- TECHNICAL PROPOSAL SPECIFICATIONS

D – COST PROPOSAL SPECIFICATIONS

EXHIBIT A - CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the bid or proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. The prices and/or cost data have been determined independently, without consultation, communication or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal or bid.
2. The attached proposal or bid is a firm offer for a period of 120 days following receipt, and it may be accepted by ITCA without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 120-day period.
3. In preparing this proposal or bid, I/we have not been assisted by any current or former employee of ITCA, whose duties relate (or did relate) to this proposal, bid or prospective contract, and who was assisting in other than his or her official, public capacity. Neither does such a person nor any member of his or her immediate family have any financial interest in the outcome of this proposal or bid. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
4. I/we understand that ITCA will not reimburse me/us for any costs incurred in the preparation of this proposal or bid.
5. I/we understand that any contract(s) awarded as a result of this RFP will incorporate Terms and Conditions substantially similar to those attached to the RFP. I/we certify that I/we will comply with these or substantially similar Terms and Conditions if selected as a contractor.
6. I/we understand that any person(s) selected as contractor(s) will be required to comply with ITCA's Nondiscrimination Requirements and the federal and state laws on which it is based. I/we will, if requested by ITCA, submit additional information about the nondiscrimination policies and plans of this organization in advance of or after the contract award.

Signature

Date

Name and Title

EXHIBIT B - DRAFT STATEMENT OF WORK AND DELIVERABLES

Brief descriptions of the goods and services that are the deliverables are defined below. The Vendor will conduct the project under ITCA leadership. Because the Vendor selected through this solicitation will be controlling the manner and means of conducting the work, the descriptions are not intended to completely describe all of the work that the Vendor would need to perform to complete the deliverables.

#	Deliverable	Description
1	Work Plan including Timeline and Schedule	<ul style="list-style-type: none"> • The Vendor shall develop a summary level description of the Vendor's approach and a detailed work plan and schedule for providing all deliverables. The work plan shall include: <ul style="list-style-type: none"> ▪ A list of tasks (include subtasks as applicable) required for performance. The list of tasks shall include start and end dates for each task and Vendor's staff that are responsible for completing each task. ▪ Timelines for tasks and subtasks ▪ Due dates for deliverables • The Vendor shall facilitate an initial meeting with a presentation of the work plan to ITCA's Management and other appropriate staff. The vendor shall be available either on-site or via web conference for the meeting.
2	Needs Assessment	<ul style="list-style-type: none"> • The Vendor shall review ITCA's current training and the training used by other State WIC Programs. • The Vendor shall assess the training needs of ITCA through interviews with state and local agency staff and review of current training. • The Vendor shall develop a report of the current trainings available and the results of the needs assessment. • The needs assessment will be presented to ITCA and used to develop the proposed training solution.
3	Training Solution	<ul style="list-style-type: none"> • The Vendor shall propose competency based training solutions for ITCA using the information from the needs assessment and input from ITCA and local agency staff. • The solution will include options for: <ul style="list-style-type: none"> • Training components such as videos, online training, resources, classes, learning modules • Needed equipment such as webcams, video camera including estimated cost • Software such as a Learning Management System or other needed software to support the training and tracking of completed training including the estimated cost • Outline of all deliverables to implement the competency-based training solution with estimated costs
TBD	Future Deliverables	<ul style="list-style-type: none"> • Future deliverables will be defined as part of Deliverable 3. Future deliverables will likely include drafts, revisions and final versions of materials; a tracking tool; pilot of the training solution; and presentation on the training solution.

EXHIBIT C - TECHNICAL PROPOSAL SPECIFICATIONS

Provide a narrative description in response to each of the specifications below.

1. Organizational Knowledge and Experience (325 Points Maximum):

a. Prior Experience with Developing or Adapting Trainings (75 points)

Bidder must describe any prior experience in developing, revising and adapting trainings.

b. Experience with Creating Training Materials and Programs for Paraprofessional Staff for Public Health and/or WIC (200 points)

Bidder must provide a detailed description of how it has performed this type of work for public health programs and/or state WIC programs. Bidder must include a DVD, internet link or paper examples of staff training solution.

c. Timeline Appropriate to the Project Deliverables (50 points)

Bidder must provide a Schedule for fulfilling the deliverables of the Scope of Work in Exhibit B, within the parameters of each deliverable. Bidder must provide a description of the overall project plan that includes the following: meeting with the ITCA after contract award, working with the ITCA to accomplish the deliverables, and communications with the ITCA and partners for the duration of the contract.

2. Qualifications (225 points Maximum).

Describe your organization's relevant staffing that will carry out the proposed work and responsibilities and qualifications of key staff. If you propose to use sub-vendors/sub-contractors for parts of this work, identify the sub-contractor and provide the required information for both you and them.

3. Business Relationships and References (75 points Maximum).

- a. List up to four contracts or similar business relationships you or your proposed subcontractors have held during the last five years for services similar to the services in this RFP. List business name, address, nature of services, contract period of performance, amount of contract, contact person and telephone numbers. Give permission for us to contact these organizations. References must not be from a person, company or organization with any special interest, financial or otherwise, in the Vendor. **ITCA employees may not be used as reference.**

4. Fiscal Capacity (75 points Maximum).

No "up front" funds are available through this contract. You would provide services, employ staff, pay claims, and perform all other work and ITCA would reimburse you after you have provided the services.

- a. Describe your fiscal capacity to pay costs "up front" and be reimbursed on a deliverable basis. (100 points)

EXHIBIT D - COST PROPOSAL SPECIFICATIONS (300 possible points)

INSTRUCTIONS:

The cost proposal must include any and all costs the contractor wishes to have included in the contractual arrangement with ITCA. The bidder should take travel expenses, labor, per diem, overhead, and any other costs related to this service into account in determining the rates proposed.

Describe/outline your costs for each of the deliverables based upon the Statement of Work in this RFP. Identify all costs in U.S. dollars including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Bidder is to submit a fully detailed budget including staff costs and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Office of Minority and Women's Business Enterprises.

The terms of any contract resulting from this RFP will be fixed payments based on the achievement and approval of deliverables. The bidder must provide an itemized, detailed cost proposal highlighting each task/milestone/deliverable, which reflects the structure or work proposed in their response. The bidder should indicate key and lead personnel in each task by name, the role or responsibility each person will assume during the task, billing rate, and number of hours proposed to complete the task. The total cost for the task must also be provided.

Budget Narrative

Provide explanations for itemized costs for the total scope of this project based on the scope of work outlined which explains the reason for each requested budget item and provides the basis for its cost. All requested items must be thoroughly justified and clearly related to the proposed project. The final scope of work may be subject to negotiation. However, awards will be made against the original scope of work provided in this solicitation document.

REMINDER:

Cost will be a factor in the selection of the Apparently Successful Bidder.

Proposal Bid Sheet on next page

Proposal Bid Sheet

Deliverable Number	Deliverable Description	Cost
1	Work Plan including Timeline and Schedule	
2	Needs Assessment	
3	Training Solutions	
TBD	Future Deliverables to be Proposed (enter hourly rate- if more than one hourly rate, identify the positions and rates for each position by adding additional lines)	