



Department of Buildings and General Services
Office of Purchasing & Contracting
133 State Street, 5th Floor | Montpelier VT 05633-8000
802-828-2211 phone | 802-828-2222 fax
<http://bgs.vermont.gov/purchasing>

Agency of Administration

SEALED BID

REQUEST FOR PROPOSAL

Mainframe Outsourcing

Expected RFP Schedule Summary:

ISSUE DATE	01/19/2024
QUESTIONS DUE	02/02/2024
ANSWERS TO QUESTIONS POSTED	02/09/2024
RFP RESPONSES DUE BY	04/16/2024
SELECTION NOTIFICATION	05/14/2024
INDEPENDENT REVIEW COMPLETED	TBD
PROJECT STARTS	TBD

PLEASE BE ADVISED THAT ALL NOTIFICATIONS, RELEASES, AND ADDENDUMS ASSOCIATED WITH THIS RFP WILL BE POSTED AT:

<http://www.bgs.state.vt.us/pca/bids/bids.php>

THE STATE WILL MAKE NO ATTEMPT TO CONTACT INTERESTED PARTIES WITH UPDATED INFORMATION. IT IS THE RESPONSIBILITY OF EACH BIDDER TO PERIODICALLY CHECK THE ABOVE WEBPAGE FOR ANY AND ALL NOTIFICATIONS, RELEASES AND ADDENDUMS ASSOCIATED WITH THIS RFP.

STATE CONTACT: Roland Ortiz
TELEPHONE: (802) 371-8987
E-MAIL: roland.ortiz@vermont.gov
FAX: (802) 828-2222

1. OVERVIEW:

- 1.1. **SCOPE AND BACKGROUND:** the Agency of Digital Services (ADS), on behalf of the Agency of Human Services (AHS), the Agency of Transportation (AOT), and the Department of Labor (DOL), hereinafter the “State” is seeking to establish a contract with a single qualified company that can provide IBM Mainframe Outsourcing to the State. The State’s existing Mainframes and Mainframe Applications are in the Maintenance and Operation (M&O) phase of their lifecycles, and as a result this “lift and shift” procurement will not include any material application development scope of work.

This RFP provides details on what is required to submit a Proposal for the Work, how the State will evaluate the Proposals, and what will be required of the Contractor performing the Work. If a suitable offer is made in response to this RFP, ADS may enter into a contract (the Contract) to have the selected Vendor (the Contractor) perform all or part of the Work.

- 1.1.1. **Executive Summary:** In 2018, the State outsourced AHS\AOT mainframe operations to reduce operational costs, decrease capital costs, improve operating performance and acquire innovative ideas. In 2020 the contract resulting from the 2018 procurement was amended to add DOL’s mainframe to the overall outsource solution. This RFP is being issued for the same mainframe outsource services initially acquired in 2018 and extended in 2020, to remain in compliance with [Bulletin 3.5](#) that establishes the general policy and standards for soliciting, awarding, processing, executing and overseeing contracts, as well as managing contract compliance.

In this RFP for Mainframe Outsourcing, the ability to reduce the State’s costs when consumption of mainframe resources decreases is an important outcome. That is, several existing Mainframe Applications have active modernization projects, so the State expects these applications to be decommissioned during the term of the Contract.

Furthermore, the State’s current Mainframe Solution is mission critical to the services that the State provides to its customers. As a result, it is even more important to ensure that any transition resulting from this RFP is done on a timely basis and does not result in any interruption of service to the customers that the State serves.

- 1.1.2. **Procurement Schedule:** Page 1 documents the critical pre-award events for the procurement. All dates are subject to change at the State’s discretion.

CONTRACT PERIOD: The Contract arising from this RFP will be the period of implementation services, plus up to five years for annual operating costs (maintenance and service). The State may consider an option to include the ability to renew for up to two additional twelve-month periods.

SINGLE POINT OF CONTACT: All communications concerning this RFP are to be addressed in writing to the State Contact listed on the front page of this RFP. Actual or attempted contact with any other individual from the State concerning this RFP is strictly prohibited and may result in disqualification.

- 1.2. **BIDDERS’ CONFERENCE:** A bidders’ conference will not be held remotely at the date and time indicated on the front page of this RFP.
- 1.3. **QUESTION AND ANSWER PERIOD:** Any bidder requiring clarification of any section of this RFP or wishing to comment on any requirement of the RFP must submit specific questions in writing no later than the deadline for question indicated on the first page of this RFP. Questions may be e-mailed to the point of contact on the front page of this RFP. Questions or comments not raised in writing on or before the last day of the question period are thereafter waived. At the close of the question period a copy of all questions or comments and the State’s responses will be posted on the State’s web site <http://www.bgs.state.vt.us/pca/bids/bids.php>. Every effort will be made to post this information as soon as possible after the question period ends, contingent on the number and complexity of the questions.
- 1.4. **CHANGES TO THIS RFP:** Any modifications to this RFP will be made in writing by the State through the issuance of an Addendum to this RFP and posted online at <http://www.bgs.state.vt.us/pca/bids/bids.php>. Modifications from any other source are not to be considered.
- 1.5. **SOURCE OF FUNDS:**

Socioeconomic affirmative steps under 2 C.F.R. § 200.321 If using applicable federal funds
Socioeconomic affirmative steps under 2 C.F.R. § 200.321 affirmative steps must include at least the following six steps:

1. Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
2. Assuring that small and minority businesses and women's business enterprises are solicited whenever they are potential sources;
3. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
4. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
5. Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
6. Requiring the prime/general contractor, if subcontracts are to be let, to take the same affirmative steps as listed in numbers 1 through 5.

If a bidder requires assistance in preparing their proposal or needs guidance on socioeconomic certifications, the bidder may contact the Procurement Technical Assistance Center (PTAC). PTAC specializes in helping small businesses navigate the documentation associated with State and Federal procurement. Their website is: <https://accd.vermont.gov/economic-development/programs/ptac>

2. Current State Description:

- 2.1. Existing / Current State Environment: Data Center and Networking Overview: See Figure 1 for a high-level current state data center and networking overview.

Figure 1: Current State High Level Data Center Environments

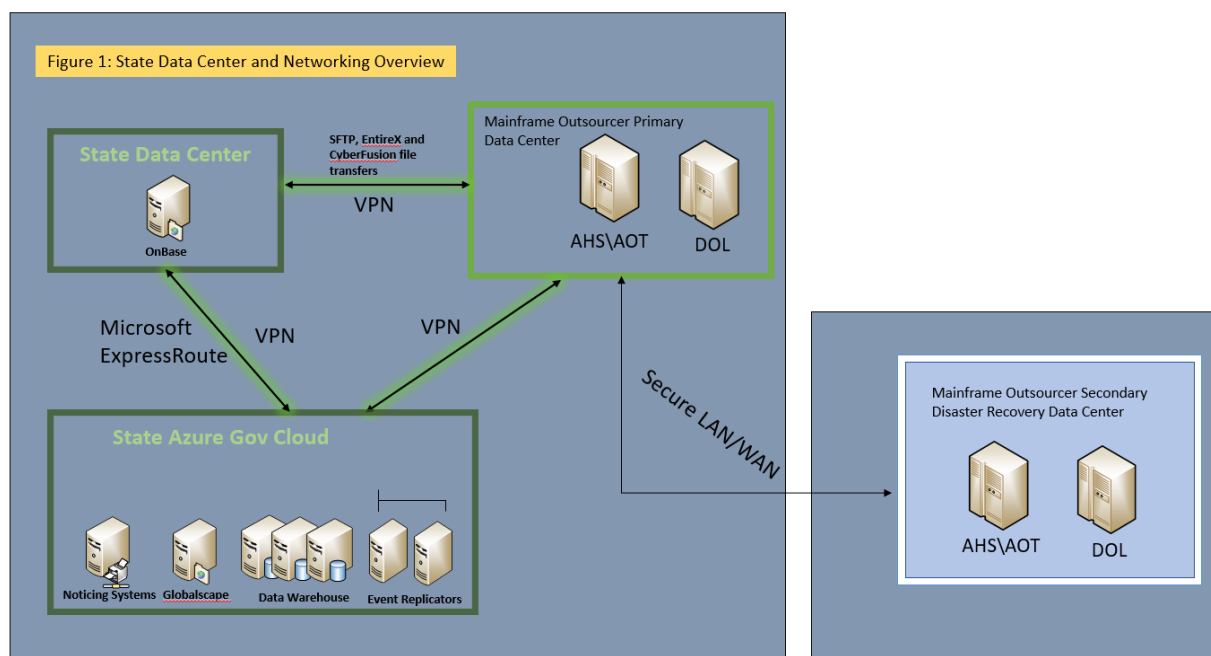


Figure 1 is a conceptual view that abstracts away details that are not related to this procurement (e.g., the State has a primary and secondary on-premises data center). State users log into a Mainframe Application using terminal emulation software and Virtual Private Network (VPN) connection. State users that are connected to the State Network can also print documents such as notices to secure printers at various State offices. The Mainframe Solution interfaces with other State Solutions (e.g., Noticing Solution) and with external organizations (e.g., IRS, SSA, State banks, etc...) using various file exchange protocols (e.g. SFTP) and software tools (e.g., EntireX, Cyberfusion). See Appendix 6 for a listing of current solution interfaces. The 95% monthly average Internet bandwidth utilization is approximately 8 megabits per second (Mbps).

- 2.2. Mainframe Solution Overview: For a more detailed view of the AHS\AOT and DOL mainframe solutions see Appendix 1. The AHS\AOT mainframe is running IBM's z/OS operating system, while the DOL mainframe is running IBM's VSE (Virtual Storage Extended) operating system. A listing of existing hardware by mainframe solution can be found in Appendix 2 – Hardware Profiles. A listing of existing IBM and third-party software used as part of the mainframe solution can be found in Appendix 3 – Mainframe Software Profiles.

The State spent considerable time and resources in documenting the hardware and software profiles to ensure accuracy but note that the State would expect a new Mainframe Outsource vendor to validate this information to ensure accuracy and completeness.

- 2.3. State Mainframe Applications: Table 1 provides a listing of the main Mainframe Applications that are currently running on the State's Outsourced mainframe solutions.

Table 1. State Mainframe Application

Mainframe Solution	Application Name	Application Description	Estimated MIPS consumption
AHS\AOT	AHS-ACCESS	AHS Healthcare and Economic Services Enrollment and Eligibility System	113 (75% of 150 total MIPS)
AHS\AOT	AOT-DMV	AOT DMV's main CRM\ERP solution	4 (12% of 37, 113+37 = 150 total MIPS)
AHS\AOT	AOT-STARs	AOT Accounting Solution	33 (88% of 37)
DOL	VABS	DOL's main benefits system (e.g., unemployment insurance)	15 (of 34 total MIPS)
DOL	CAT	DOL's Tax System	15 (of 34 total MIPS)
DOL	FARS	DOL Accounting Solution	4 (of 34 total MIPS)

2.3.1. ACCESS Application:

Since ACCESS (A Central Computerized Enforcement Service System) is the State's largest and most complex mainframe application, we will provide more details on its functionality. ACCESS is an integrated system used to determine, track, and report eligibility for healthcare and economic benefit programs.

The ACCESS application provides the following functionality:

- Case Management, Eligibility and Enrollment, and a Business Rules Engine
- Data warehouse, including version control and history records for all clients, benefit issuance history;
- Master Person Index (MPI) which is shared among all programs supported by ACCESS;
- Identity verification and indexing;

- Overpayment and underpayment remediation systems;
- Billing systems for Department Vermont Health Access (DVHA) Premium bills;
- Client correspondence systems for all programs containing automated and manual client notifications;
- Overpayment and underpayment remediation systems;
- Reporting functionality for a large variety of online and external reports generated on a daily, weekly, monthly, or annual basis which support these programs.

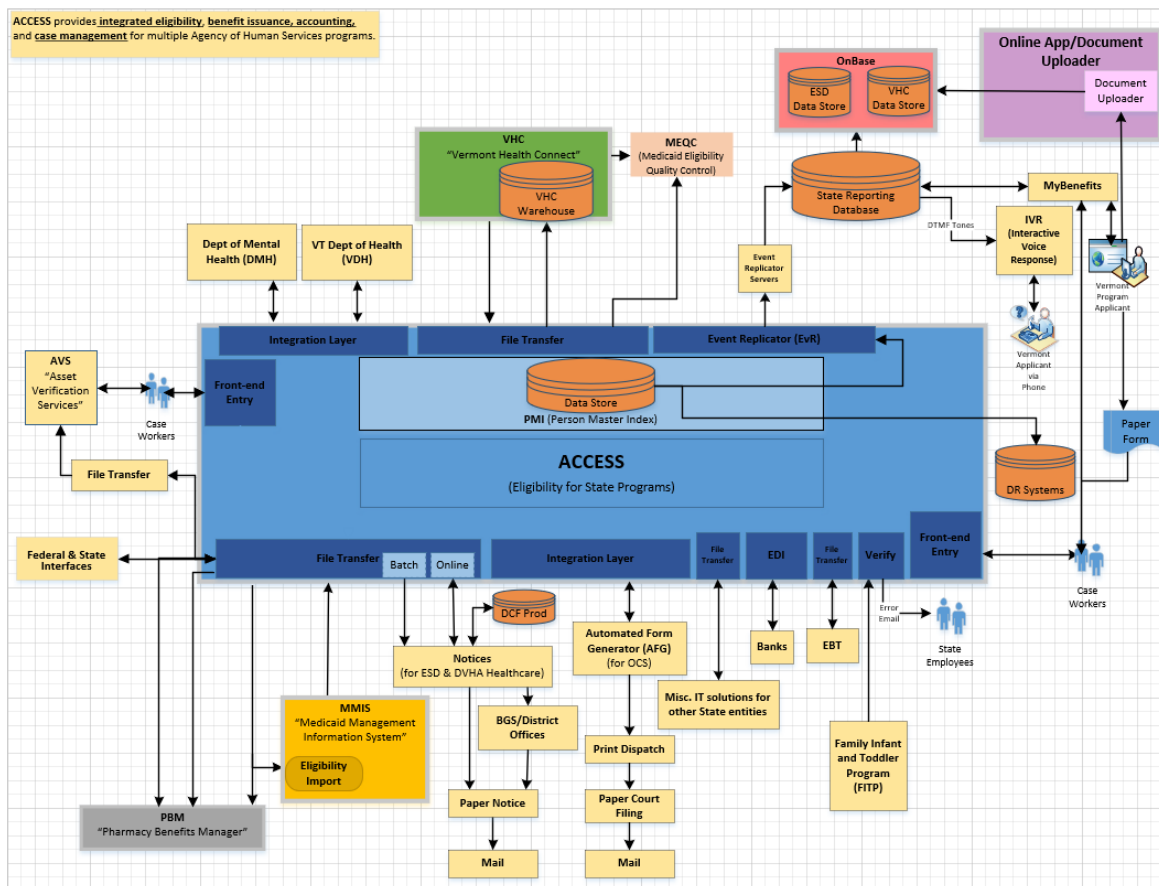
A component of ACCESS is a benefit issuance program supporting multiple payment types including physical check, direct deposit, and EBT benefits in food or cash formats. ACCESS provides client management, including but not limited to Client Sanctions, Worker case notifications, Automated closures, Automated verification requests, Provider physician assignment and tracking, and built-in warnings – including family violence. ACCESS contains accounting functionality to track money received from clients, and money issued to clients.

ACCESS contains quality control processes including auditing, case sampling, and access auditing logs (including full history of worker actions). ACCESS contains role-based permissions, where access can be enabled to restricted/read only/full permissions, as well as restrictions based on functionality, data sensitivity (such as FTI, SSA, PHI, PII), or on an individual case basis. ACCESS has the capability to perform online immediate, or large-scale batch processing. ACCESS has built in cost allocation features for the various programs it supports.

ACCESS resides on an IBM mainframe at the State's outsourced mainframe hosting data center. It is built on a zOS mainframe, and utilizes NATURAL as the programming language, and ADABAS as the database. ACCESS was first deployed in 1983 and mainly leverages and utilizes Software AG products such as, Adabas, EntireX, Natural, and Event Replicator. Software AG's ADABAS data management system is hard coded, proprietary, and considered a monolithic architecture. See Appendix 2 and 3 for details on the State's current state for both hardware and software.

Currently, the State's M&O system development staff primarily support the ACCESS mainframe application but the State's current Mainframe Outsource partner has also provided limited ad hoc application development support.

Figure 2, below, depicts an Integrated Eligibility System (IES) view of an architectural representation between ACCESS and other systems used to support the business functions of IES.



3. DETAILED REQUIREMENTS/DESIRED OUTCOMES:

3.1. The State is interested in obtaining bids to meet the following business need(s): a) reduce operational costs, b) improve operating performance and c) acquire innovative ideas. Across the State there are many initiatives and projects to modernize the State's IT infrastructure including some related to the applications currently running on the State's Mainframe Outsourcing solution. A key driver in seeking a more consumptive (variable) pricing model is to minimize the financial impact on the Agencies or Departments, and their related benefit programs, that remain on the Mainframe Outsource solution as applications and programs are moved over time to modernized solutions. That is, the State would like to structure the contract such that as programs or applications are moved off a mainframe, the resulting decrease in the consumption of mainframe resources will translate into a cost reduction to the State.

Another business need we hope to meet with this procurement, is to decrease the administrative cost of managing the Contract by structuring it to support Statement of Works (SOWs), and where it makes financial and contractual sense, transfer the management of third-party software licensing.

3.2. The State of Vermont seeks to achieve the following Business Value(s):

3.2.1. **Cost Savings:** Over the lifecycle of the new solution, the total costs will be less than the current solution costs. Since ADS allocates mainframe outsourcing cost to its customers based on mainframe

resource utilization, reducing cost as our mainframe utilization decreases is important so that the programs or applications that remain on a mainframe solution do not see significant cost increases over time. The State is looking to reduce both contract and internal business office costs related to change management and the licensing of third-party software.

3.3. Desired Approach

3.3.1. The State currently has several mainframe applications that are approaching the end of their lifecycles. As a result, the State is not looking to engage in any significant application refactoring to accommodate mainframe hardware or software environmental changes. Mandatory and elective environmental changes relative to the current state should be justified in Appendix 4 Bidder Response form Part 2. The State will look at application refactoring to accommodate environmental changes that require more than 16 hours from the State's Application M&O team, inclusive of requirement and technical design documentation, coding, and smoke testing as significant application refactoring. With that said, the State is open to ideas around improving our overall operations and the whole product solution.

Regarding solution staffing, the State does have existing teams to support M&O application development and intends to continue being the prime M&O application development entity moving forward. However, when allowed by our Federal Partners and collective bargaining agreements, the State may from time-to-time request M&O Application Development contractor support if the winning bidder is willing and able to provide required expertise and experience on an ad hoc basis.

To be clear the State **does not** have significant resources, experience, and expertise for managing and operating the Mainframe execution environment(s) which run the State's Mainframe Applications and that is the focus of this procurement.

Regarding the management of third-party software (non-IBM), the State does currently license most third-party software that is in use, but some are provided by our current Mainframe Outsourcer. The State is open to considering third-party software alternatives that are functionally equivalent (e.g., jobs scheduler), and wherever possible prefers that the mainframe outsourcer provides these third-party applications and include their costs in their standard hosting pricing. Where it makes financial sense, or there are no alternatives from a licensing perspective, the State is willing to continue directly licensing third-party software. Note that the State expects its mainframe outsourcer to provide all required IBM software as part of its standard hosting pricing.

3.4. Scope of Work

3.4.1. Please refer to Appendix 4 for a detailed listing of roles and responsibilities for both the State and selected vendor. In summary the vendor will implement and support mainframe outsourcing solution(s) and services, including but not limited to:

- Building the required State mainframe processing environment(s), considering all IBM and 3rd Party licensing terms, including but not limited to: a) CPU, b) Tape backups, c) Disk Array Storage (DASD), and all required networking equipment for secure communications with the State;
- Providing Disaster Recovery solution and support services;
- Implementing all batch and real time interfaces listed in Appendix 6;
- Providing ad hoc and operational reporting.

Please refer to Appendix 7 for a listing of expected contract deliverables. The State is committed to working collaboratively with the selected vendor to share information that it has required to produce all deliverables.

3.5. Functional and Non-Functional Requirements

3.5.1. The State's Functional and Non-Functional Requirements are provided in the attached **State of Vermont Bidder Response Form (Appendix 5)**.

3.4.1.1. Data Compliance: Solutions must adhere to applicable State and Federal standards, policies, and laws. The Bidder Response Form includes a table of data types and their applicable State and Federal standards, policies, and laws. The boxes in the table that are checked are the ones that are applicable to this procurement.

3.5.2. The Non-Functional Requirements include requirements for the following:

- Hosting
- Application Solution
- Security Requirements
- FNS Compliance
- Testing
- Data Compliance

4. GENERAL REQUIREMENTS:

4.1. **PRICING:** Bidders must price the terms of this solicitation at their best pricing. Any and all costs that Bidder wishes the State to consider must be submitted for consideration. If applicable, all equipment pricing is to include F.O.B. delivery to the ordering facility. No request for extra delivery cost will be honored. All equipment shall be delivered assembled, serviced, and ready for immediate use, unless otherwise requested by the State.

4.1.1. Prices and/or rates shall remain firm for the initial term of the contract. The pricing policy submitted by Bidder must (i) be clearly structured, accountable, and auditable and (ii) cover the full spectrum of materials and/or services required.

4.1.2. **Retainage.** In the discretion of the State, a contract resulting from this RFP may provide that the State withhold a percentage of the total amount payable for some or all deliverables, such retainage to be payable upon satisfactory completion and State acceptance in accordance with the terms and conditions of the contract.

4.2. **STATEMENT OF RIGHTS:** The State shall have the authority to evaluate Responses and select the Bidder(s) as may be determined to be in the best interest of the State and consistent with the goals and performance requirements outlined in this RFP. The State of Vermont reserves the right to obtain clarification or additional information necessary to properly evaluate a proposal. Failure of bidder to respond to a request for additional information or clarification could result in rejection of that bidder's proposal. To secure a project that is deemed to be in the best interest of the State, the State reserves the right to accept or reject any and all bids, in whole or in part, with or without cause, and to waive technicalities in submissions. The State also reserves the right to make purchases outside of the awarded contracts where it is deemed in the best interest of the State.

4.2.1. **Best and Final Offer (BAFO).** At any time after submission of Responses and prior to the final selection of Bidder(s) for Contract negotiation or execution, the State may invite Bidder(s) to provide a BAFO. The state reserves the right to request BAFOs from only those Bidders that meet the minimum qualification requirements and/or have not been eliminated from consideration during the evaluation process.

4.2.2. **Presentation.** An in-person or webinar presentation by the Bidder may be required by the State if it will help the State's evaluation process. The State will factor information presented during presentations into the evaluation. Bidders will be responsible for all costs associated with providing the presentation.

4.3. **WORKER CLASSIFICATION COMPLIANCE REQUIREMENTS:** In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), Bidders must comply with the following provisions and requirements.

4.3.1. **Self Reporting:** For bid amounts exceeding \$250,000.00, Bidder shall complete the appropriate section in the attached Certificate of Compliance for purposes of self-reporting information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding and classification of workers. The State is requiring information on any violations that occurred in the previous 12 months.

4.3.2. **Subcontractor Reporting:** For bid amounts exceeding \$250,000.00, Bidders are hereby notified that upon award of contract, and prior to contract execution, the State shall be provided with a list of all proposed subcontractors and subcontractors' subcontractors, together with the identity of those subcontractors' workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54). This requirement does not apply to subcontractors providing supplies only and no labor to the overall contract or project. This list **MUST** be updated and provided to the State as additional subcontractors are hired. A sample form is available online at <http://bgs.vermont.gov/purchasing-contracting/forms>. **The subcontractor reporting form is not required to be submitted with the bid response.**

4.4. **METHOD OF AWARD:** Awards will be made in the best interest of the State. The State may award one or more contracts and reserves the right to make additional awards to other compliant bidders at any time if such award is deemed to be in the best interest of the State.

4.4.1. **Evaluation Criteria:** Consideration shall be given to the Bidder's project approach and methodology, qualifications and experience, ability to provide the services within the defined timeline, cost, and/or success in completing similar projects, as applicable, and to the extent specified below in Table 2.

Table 2. Bid Evaluation Factors and Weights.

Evaluation Factors	Total Points for This Factor
Vendor Profile: Experience, Financial Strength, References. See Bidder Response Form Part 1 Vendor Profile.	10%
Vendor Proposal/Solution, Maintenance and Support Services, and ability to meet the State's requirements. See Bidder Response Form Part 2 Vendor Proposal, Part 3 Functional Requirements, Part 4 Non-Functional Requirements, and Part 7 Maintenance and Support Services.	50%
Professional Implementation Services: Project Management and Technical Services. See Bidder Response Form Part 5 Implementation/Project Management Approach, and Part 6 Technical Services.	10%
Pricing, total cost, flexible pricing model, flexible terms, etc. See Bidder Response Form Part 8.	30%
Acceptance of State Terms and Conditions	Pass/Fail
Adherence to Mandatory Bidding Requirements	Pass/Fail

4.5. **CONTRACT NEGOTIATION:** Upon completion of the evaluation process, the State may select one or more bidders with which to negotiate a contract, based on the evaluation findings and other criteria deemed relevant for ensuring that the decision made is in the best interest of the State. In the event State is not successful in negotiating a contract with a selected bidder, the State reserves the option of negotiating with another bidder, or to end the proposal process entirely.

- 4.6. **COST OF PREPARATION:** Bidder shall be solely responsible for all expenses incurred in the preparation of a response to this RFP and shall be responsible for all expenses associated with any presentations or demonstrations associated with this request and/or any proposals made.
- 4.7. **CONTRACT TERMS:** The selected bidder(s) will be expected to sign a contract with the State. A sample contract with all standard applicable State attachments, including Attachment C, are included with this RFP as MF RFP 2024 Appendix 8 VT Sample Contract with Attachments.
- 4.7.1. **Business Registration.** To be awarded a contract by the State of Vermont a bidder (except an individual doing business in his/her own name) must be registered with the Vermont Secretary of State's office <https://sos.vermont.gov/corporations/registration/> and must obtain a Contractor's Business Account Number issued by the Vermont Department of Taxes <http://tax.vermont.gov/>.
- 4.7.2. The contract will obligate the bidder to provide the services and/or products identified in its bid, at the prices listed.
- 4.7.3. **Payment Terms.** Percentage discounts may be offered for prompt payments of invoices; however, such discounts must be in effect for a period of 30 days or more in order to be considered in making awards.
- 4.7.4. **Quality.** If applicable, all products provided under a contract with the State will be new and unused, unless otherwise stated. Factory seconds or remanufactured products will not be accepted unless specifically requested by the purchasing agency. All products provided by the contractor must meet all federal, state, and local standards for quality and safety requirements. Products not meeting these standards will be deemed unacceptable and returned to the contractor for credit at no charge to the State.
- 4.8. **DEMONSTRATION:** An in-person or webinar demonstration by the Bidder may be required by the State if it will help the State's evaluation process. The State will factor information presented during demonstrations into the evaluation. Bidder will be responsible for all costs associated with the providing the demonstration.
- 4.9. **INDEPENDENT REVIEW:** Certain State information technology projects require independent expert review as described under 3 V.S.A. § 3303(d). Such review, if applicable, will inform the State's decision to award any contract(s) resulting from this RFP

5. **CONTENT AND FORMAT OF RESPONSES:** The content and format requirements listed below are the minimum requirements for State evaluation. These requirements are not intended to limit the content of a Bidder's proposal. Bidders may include additional information or offer alternative solutions for the State's consideration. However, the State discourages overly lengthy and costly proposals, and Bidders are advised to include only such information in their response as may be relevant to the requirements of this RFP.

5.1. The bid should include a Cover Letter and Technical Response and Price Schedule.

5.2. **COVER LETTER:**

- 5.2.1. Confidentiality. To the extent your bid contains information you consider to be proprietary and confidential, you must comply with the following requirements concerning the contents of your cover letter and the submission of a redacted copy of your bid (or affected portions thereof).
- 5.2.2. All responses to this RFP will become part of the contract file and will become a matter of public record under the State's Public Records Act, 1 V.S.A. § 315 et seq. (the "Public Records Act"). If your response must include material that you consider to be proprietary and confidential under the Public Records Act, your cover letter must clearly identify each page or section of your response that you consider proprietary and confidential. Your cover letter must also include a written explanation **for each marked section** explaining why such material should be considered exempt from public disclosure in the event of a public records request, pursuant to 1 V.S.A. § 317(c), including the prospective harm to the competitive position of the bidder if the identified material were to be released. Additionally, you must include a redacted copy of your response for portions that are considered proprietary and confidential. Redactions must be limited so that the reviewer may understand the nature of the information being withheld. It is typically inappropriate to redact entire pages, or to redact the titles/captions of tables and figures. Under no circumstances may your entire response be marked confidential, and the State reserves the right to disqualify responses so marked.

5.2.3. **Exceptions to Contract Terms and Conditions.** If a Bidder wishes to propose an exception to any terms and conditions set forth in the Standard Contract Form and its attachments, such exceptions must be included in the cover letter to the RFP response. Failure to note exceptions when responding to the RFP will be deemed to be acceptance of the State contract terms and conditions. If exceptions are not noted in the response to this RFP but raised during contract negotiations, the State reserves the right to cancel the negotiation if deemed to be in the best interests of the State. Note that exceptions to contract terms may cause rejection of the proposal.

5.3. **TECHNICAL RESPONSE.** In response to this RFP, a Bidder shall:

5.3.1. Provide details concerning your form of business organization, company size and resources.

5.3.2. Describe your capabilities and particular experience relevant to the RFP requirements.

- Identify all current or past State projects.

5.3.3. Identify the names of all subcontractors you intend to use, the portions of the work the subcontractors will perform, and address the background and experience of the subcontractor(s), as per RFP section 4.3.2 above.

5.4. **REFERENCES.** Refer to Bidder Response Form (Appendix 5) Part 1 Question 7.

5.5. **REPORTING REQUIREMENTS:** Provide a sample of any reporting documentation that may be applicable to the Detailed Requirements of this RFP.

5.6. **PRICE SCHEDULE:** Bidders shall submit their pricing information in Part 8 of the Bidder Response Form (Appendix 5).

5.7. **CERTIFICATE OF COMPLIANCE:** This form must be completed and is provided in Part 10 of the Bidder Response form (Appendix 5) and must be submitted as part of the response for the proposal to be considered valid.

5.8. **STATE OF VERMONT BIDDER RESPONSE FORM (APPENDIX 5):** This form must be completed and submitted as part of the response for the proposal to be considered valid. The State of Vermont Bidder Response Form provides a standard format and content for bidder proposals. When required, this form will prompt Bidders to supply the information required in the above RFP sections 4.3 through 4.7. Note: In addition to completing the State of Vermont Bidder Response Form, Bidders are required to provide the specific attachments that are described within the Bidder Response Form.

6. **SUBMISSION INSTRUCTIONS:**

6.1. **CLOSING DATE:** Bids must be received by the State by the due date specified on the front page of this RFP. Late bids will not be considered.

6.1.1. The State may, for cause, issue an addendum to change the date and/or time when bids are due. If a change is made, the State will inform all bidders by posting at the webpage indicated on the front page of this RFP.

6.1.2. There will not be a public bid opening. However, the State will record the name, city and state for any and all bids received by the due date. This information will be posted as promptly as possible following the due date online at: <https://bgs.vermont.gov/content/opc-bid-tabulation-sheets-0> . Bidders are hereby notified to review the information posted after the bid opening deadline to confirm receipt of bid by the State. Any bidder that submitted a bid, and is not listed on the bid tabulation sheet, shall promptly notify the State Contact listed on the front page of this RFP. Should a bidder fail to notify the State Contact listed on the front page of this RFP within two weeks of posting the bid tabulation sheet, the State shall not be required to consider the bid.

6.2. **BID DELIVERY INSTRUCTIONS:**

6.2.1. **ELECTRONIC:** Only electronic bids will be accepted.

- **E-MAIL BIDS.** Only emailed bids will be accepted. Bids will be accepted via email submission to SOV.ThePathForward@vermont.gov. Bids must consist of a single email with a single,

digitally searchable PDF attachment containing all components of the bid. Multiple emails and/or multiple attachments will not be accepted. There is an attachment size limit of 40 MB. It is the Bidder's responsibility to compress the PDF file containing its bid if necessary in order to meet this size limitation.

7. BID SUBMISSION CHECKLIST:

- ✓ Cover Letter
- ✓ Redacted Technical Response, if applicable
- ✓ State of Vermont Bidder Response Form and Attachments (Appendix 5)
 - ✓ o A Financial Statement (and a confidentiality statement if, the financial information is considered non-public) labeled Attachment #1.
 - ✓ o A Road Map labeled Attachment #2.
 - ✓ o Executive PowerPoint labeled Attachment #3.
 - ✓ o A proposed list of project phases, tasks and an implementation time-line labeled Attachment #4.
 - ✓ o Project Manager resume labeled Attachment #5.
 - ✓ o An Implementation plan labeled Attachment #6.
 - ✓ o Technical Resource Resumes labeled Attachment #7.
 - ✓ o Your Service Level Agreement (SLA) labeled Attachment #8.
 - ✓ o Certificate of Compliance.
 - ✓ o Subcontractor Reporting Form (included in Bidder Response Form)

8. OTHER ATTACHMENTS:

- 8.1. MF RFP 2024 Appendix 1 Overview V3.pdf
- 8.2. MF RFP 2024 Appendix 2 HW Profile v3.pdf
- 8.3. MF RFP 2024 Appendix 3 SW Profile v3.pdf
- 8.4. MF RFP 2024 Appendix 4 Roles and Responsibilities V5.pdf
- 8.5. MF RFP 2024 Appendix 5 Bidder Response Form V5.docx
- 8.6. MF RFP 2024 Appendix 6 Interfaces v3.xlsx
- 8.7. MF RFP 2024 Appendix 7 Contractor Deliverables v5.xlsx
- 8.8. MF RFP 2024 Appendix 8 VT Sample Contract with Attachments.pdf