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## **SECTION 8 PROPOSAL FORMAT**

### **8.1. INTRODUCTION**

These instructions prescribe the mandatory proposal format and the approach for the development and presentation of bid data. Format instructions must be adhered to, all requirements and questions in the RFP must be responded to, and all requested data must be supplied. Submissions include a Conceptual Proposal, a Draft Proposal and a Final Proposal.

Bidders may submit proposals for any or all of the component CRS services (Network Services, Call Center Services, and/or Network Management Services) identified in this RFP. However each proposal for each component CRS service must be separately proposed and submitted without reference to any other proposal or submission, and shall be available for award as a binding offer independently of the award status of any other proposal, except that a firm awarded the Network Management Services component shall not also be awarded either the Network Services component or a Call Center Services component.

### **8.2. CONCEPTUAL PROPOSAL FORMAT AND CONTENT**

Each Conceptual Proposal shall be completely sealed, marked and delivered as indicated in RFP Section 2.5.6. The Conceptual Proposal shall be submitted to the Procurement Official listed in RFP Section 1.5 by the time indicated in RFP Section 1.7, Vendor Key Action Dates. Ten (10) copies of the Conceptual Proposal shall be included with one (1) set clearly marked "Master Copy." The Conceptual Proposal is to contain a general description of the bidder's approach to meeting the requirements of the RFP with enough detail, including diagrams, to allow the DDTP to determine if there are any conceptual defects or deficiencies in the bidder's proposed solution. The Conceptual Proposal should not focus on the superlative capabilities of the bidder, but instead should focus on the bidder's proposed solution. CCS and NS vendors not adhering to the architecture proposed in RFP Section 4.4 et seq. shall clearly describe their proposed solution's architecture in at least equivalent detail. CCS bidders shall indicate in their Conceptual Proposals the make and model of all of their ACD switches, and IVRs if any, that will be used for CRS, including used by subcontractors handling CRS calls, if any. NMS bidders shall indicate the type of platform that will be used to monitor CCS providers' switches and shall list the make and model of switches that it is capable of monitoring with regard to the NMS requirements of the RFP. The Conceptual Proposal shall not include any actual bid costs or rates although discussion of costs in general may be included. Conceptual proposals should be limited to not more than 25 pages.

### 8.3. DRAFT PROPOSAL FORMAT AND CONTENT

Each Draft Proposal shall be completely sealed, marked and delivered as indicated in RFP Section 2.5.6. The draft proposal shall be submitted to the Procurement Official listed in Section 1.5 by the time indicated in Section 1.7, Vendor Key Action Dates. Note that the draft proposal due date is different for CCS draft proposals, as compared to the draft proposal due date for NS and NMS draft proposals. NS and NMS draft proposals submitted by the same bidder must be submitted in separately sealed and labeled boxes. In all cases, one (1) complete set of all

required volumes shall be clearly marked “Master Copy.” Each Draft Proposal must contain all the material specified below except that there shall be “XXX”s in place of all cost figures and percentages related to bid costs. The completed contract must also be included but need not be signed. However, the contract should contain the name and title of the person who will be signing for the vendor at the submission of the Final Proposal. Each Draft Proposal must be submitted in the number of copies indicated below:

- Volume I, Response to Requirements 10 Copies
- Volume II, Completed Contract ..... 5 Copies
- Volume III, Cost Data ..... 5 Copies
- Volume IV, Reference Literature ..... 5 Copies

The contents of these volumes are described below.

### 8.3.1. Volume I - Response to Requirements (10 Sets)

This volume must contain all responses to the Administrative Requirements, and Technical Requirements of the RFP. All forms and questionnaires, except for cost data, must be completed and included in this volume. Each page must be numbered in a manner of the bidder’s own choosing to make easy reference possible. The organization is to be as follows:

- Cover Letter– First page
- Section 1 – General
- Section 2 – Response to Administrative Requirements (RFP Section 5)
- Section 3 – Response to Technical Requirements (RFP Section 6)

#### (1.) Cover Letter

The cover letter must be prepared and signed in accordance with RFP Section 2.5.5. and included as the first page of Volume I. The cover letter must indicate which CRS component (NS, CCS or NMS) the bidder is proposing in its proposal. Note if a bidder is proposing more than one component, each proposed component requires its own complete and separately sealed proposal, with its own signed Cover Letter and Volumes I through IV.

#### (2.) Section 1, General

This section should contain a narrative of the bidder’s compliance and/or response to the overall design and service requirements of the envisioned CRS environment as described in RFP Sections 4 and 6. The narrative should reflect the bidder’s understanding of the DDTP’s proposed CRS operations and requirements, and provide an overview of the bidder’s proposed solution, with a diagram

illustrating the architecture of the proposed system and how it will integrate to the other NS, CCS and/or NMS components as presented in the RFP. In this respect, the narrative should contain a summary of the salient features of the bidder's proposal including an overview of the equipment and/or services being offered.

(3.) **Section 2, Response to Administrative Requirements**

This section should contain a brief narrative of the bidder's compliance and/or response for each item (all paragraphs and subparagraphs) identified in RFP Section 5, Administrative Requirements of the RFP. Each response must reference the appropriate Section 5 paragraph number, and shall be provided in the same paragraph sequence as they are provided in the RFP. This section must also include the complete response to Section 5.10, DVBE Participation Requirements, including all required supporting forms and documents.

(4.) **Section 3, Response to Technical Requirements**

This section should contain the bidder's response for each requirement (all paragraphs and subparagraphs) identified in Section 6.2. et seq., or 6.3. et seq., or 6.4. et seq., of the Technical Requirements depending upon the CRS component being proposed, and in keeping with the overall objectives of Section 4, Proposed Services. Proposals should include a detailed table of contents with page numbers. Each response must use the following format:

*Bidder understands the requirement and shall meet or exceed it?*

*Yes* \_\_\_ *No* \_\_\_

*Reference:*

*document* \_\_\_\_\_

*location* \_\_\_\_\_ *page* \_\_\_\_\_

*paragraph* \_\_\_\_\_

*Description:*

Bidders shall check either "Yes" or "No" in response to the question, "*Bidder understands the requirement and shall meet or exceed it?*" to indicate that either they understand the DDTP's requirement as stated in the RFP and that they shall comply with the requirement, or that they either do not understand the requirement and therefore cannot assure its compliance or that they do understand the requirement but do not plan to comply with it. A bidder's response that they cannot or do not plan to comply with a mandatory or mandatory-optional requirement will likely disqualify the bidder from possible award. Unless otherwise listed, each reference to an RFP requirement includes all aspects of the requirement that may be

required in order to provide full functionality of the requirement whether or not every aspect is detailed in the RFP requirement's specification. All bidders must provide a response to every "mandatory" and "mandatory-optional" requirement within their proposed component. Failure to respond to a mandatory or mandatory-optional requirement may be cause for rejection of the bidder's final proposal.

If the bidder wishes to reference explanatory material (e.g., expanded narrative description, technical literature, examples of reports, etc.) in support of its response to the requirement the bidder shall indicate the document's title (if any) immediately after "*document*", followed by its location in the bidder's proposal (such as "Volume 4, tab 8"), the specific page number(s) and if appropriate, the specific paragraph number(s) or other indicators that will lead the evaluation team to easily substantiate compliance with the requirement.

Bidder may also use the "*Description*" area to provide information, comments, or product or program description in support of their plans to meet the requirement, including an explanation of how the bidder will meet the requirement. An electronic version of RFP Section 6 in Microsoft Word is available upon request to all bidders. Bidder's may use this to prepare their responses to the technical requirements so that they might provide more room to respond to individual requirements. If any differences are found between the RFP requirements as issued by the DDTP in paper or electronic format and between the requirements as returned in the bidder's response, the requirements as issued by the DDTP shall prevail, whether identified by the DDTP at the time of evaluation and award or not.

The DDTP reserves the right to determine if a bidder's response to the requirement, as detailed in their description and/or supporting documentation, supports or contradicts the bidder's claim of intended compliance.

Bidders should be aware that the successful provider(s) will be required to comply with all requirements of the RFP and resulting contract, not just the technical requirements.

### **8.3.2. Volume II – Contract (5 sets)**

Volume II of the Draft Bid submittal must contain the completed contract, with DDTP approved contract language, **excluding any cost information**. For the draft Proposal, place "XXX"s in place of dollar amounts and percentages bid related to costs, and do not fill in the effective dates.

### **8.3.3. Volume III – Cost Data (5 sets)**

This volume must contain all cost sheets required by this RFP. The organization is to be either Exhibit 7A, 7B, or 7C, and a cost sheet listing

prices or pricing methodologies associated with any Mandatory-Optional items associated with the bidding component.

It is important that no figures be included in the Draft Proposal. The use of “XXX”s is required rather than figures in place of cost figures and percentages related to bid costs. Cost figures and percentages are to be included only with the Final Bid.

### 8.3.4. Volume IV – Literature (5 sets)

This volume must contain all technical and other reference literature or descriptions necessary to support the responses to the requirements of this RFP, including literature referenced in the bidder’s RFP response. This volume may be organized in any manner deemed appropriate by the bidder to facilitate DDTP verification of the bidder’s intent and/or ability to comply with the requirements of the RFP.

## 8.4. FINAL PROPOSAL FORMAT AND CONTENT

The Final Proposal shall be completely sealed, marked and delivered as indicated in RFP Section 2.5.6. NS, CCS and/or NMS final proposals submitted by the same bidder must be submitted in separately sealed and labeled boxes. Each Final Proposal shall be submitted to the Procurement Official listed in Section 1.5 by the time indicated in Section 1.7, Vendor Key Action Dates. One (1) complete set of all required volumes shall be clearly marked “Master Copy”.

Each Final Proposal must be submitted in the same format as the Draft Proposal except that it must include all cost figures, must be signed, and must include any bonding information required with the final bid. The complete Contract must also be included. The Contract must be signed.

Each Final Proposal must be submitted in the same number of copies as the draft proposal, i.e:

- Volume I, Response to Requirements 10 Copies
  - Cover Letter
  - Section 1, General
  - Section 2, Response to Administrative Requirements
  - Section 3, Response to Technical Requirements
- Volume II, Completed Contract ..... 5 Copies
- Volume III, Cost Data ..... 5 Copies
- Volume IV, Reference Literature ..... 5 Copies

Note that for the Final Proposal evaluation, Volume 1, Section 1, *General*, will be scored along with portions of Section 2, *Response to Administrative Requirements*, and portions of Section 3, *Response to Technical Requirements*. See RFP Section 9.4.5. for details. Section 1 should include a diagram illustrating the architecture of the proposed system and how it will integrate to the other NS, CCS and/or NMS components as presented in the RFP. Section 3 should include a detailed table of contents with page numbers. To the extent available, bidders may wish to also provide a copy of their proposal, without Volume III, Cost Data, and Volume V, Additional Commitments (see RFP Section 8.5.), on a CD-ROM.

The five (5) sets of Volume III, Cost Data, must be submitted within the bidder’s sealed proposal in separately sealed envelope marked on the outside with the

bidding firm's name and "Volume III – Cost Data for DDTP CRS RFP, Final Proposal."

The five (5) sets of Volume IV, Literature, for the final bid may be the same ones submitted for the Draft Proposal but supplemented with any needed updates. In this respect, bidders should notify the DDTP Procurement Official at the time of submission of their Draft Proposal that they wish to have their Volume IV returned after evaluations of the Draft Proposals are complete so that they may resubmit them with their Final Proposal. Changes and/or updated pages to Volume IV must be brought to the attention of the DDTP with submission of the Final Proposal.

## 8.5. ADDITIONAL COMMITMENTS

Bidders may not include within Volumes I, II, III, IV or V of their Final Proposal any alternative solutions or proposals not solicited within RFP Sections 4, 5 and 6, which might confuse the understanding of what exactly is being proposed and offered in response to the DDTP's requirements stipulated in the RFP. Therefore, if a bidder wishes to offer additional or alternative commitments to those proposed specifically in response to the requirements stipulated in the RFP, the bidder may also include with its proposal such Additional Commitments as long as such Additional Commitments are wholly and exclusively described and offered within a fifth proposal volume.

If a bidder includes, within its proposal such Additional Commitments, the bidder shall include within its cover letter to Volume I a statement that it is offering Additional Commitments within a separately sealed Volume V, without describing or disclosing the nature or any other information of the alternative commitments in said cover letter. Note that this cover letter is separate from the cover letter contained within Volume V, described below.

This Volume V, Additional Commitments, shall be provided in five sets with one marked "Master." All five sets must be enclosed *within a separately sealed package* within the bidder's overall sealed Final Proposal package. This separately sealed package containing the Volume V sets shall be marked on the outside with the bidder's name, "CRS RFP," the component being bid ("NS," "CCS" or "NMS"), and the words, "Additional Commitments." This separately sealed package shall not be marked with any description or titles that would divulge the subject of the bidder's Additional Commitments.

Volume V, Additional Commitments, shall be organized with the following sections:

### (1.) Cover Letter

The cover letter must be prepared and signed in accordance with RFP Section 2.5.5. and included as the first page of Volume V. The cover letter must indicate which CRS component (NS, CCS or NMS) the bidder's Additional Commitments are in response to. If a bidder is proposing Additional Commitments in response to more than one component, such Additional Commitments must be separately proposed within each of the bidder's component proposals, and each must only offer Additional Commitments germane to that component.

### (2.) Section 1, General

This section should contain a comprehensive narrative description of the bidder's overall alternative commitment offering. It shall include a description of the rationale and benefit to the DDTP and/or the CRS

users if the Additional Commitments were awarded. This narrative should also confirm the bidder's understanding of the DDTP's proposed CRS operations and requirements. The narrative should contain a summary of the salient features of the bidder's proposed alternative commitments including an overview of the equipment and/or services being offered.

This section should also describe the overall impact that such Additional Commitments would make, if awarded, on the bidder's proposed solution contained in its Volumes I, II, III, and IV of its Final Proposal. Bidders are cautioned that their alternative commitment offerings cannot place any conditional limitations upon the offering separately contained in their Final Proposals. For example, statements such as "This alternative commitment offering negates our firm's Final Proposal as offered in Volumes I, II, III or IV" are not acceptable.

**(3.) Section 2, Response to Technical Requirements**

This section should contain the specific changes or additions to the bidder's response for each requirement identified in RFP Section 6.2. et seq., or 6.3. et seq., or 6.4. et seq., depending upon the CRS component being proposed, that would be effected by the proposed Additional Commitments. At a minimum, each effected RFP Section 6 requirement that would be effected by the Additional Commitments, if awarded, shall be listed by section number and title, with a detailed description of the Additional Commitment's offering and impact that are germane to the RFP section. This section should also include a detailed table of contents with page numbers.

**(4.) Section 3, Additional Contractual Commitments (Optional)**

This section should contain additional contractual commitments, if any, that the bidder may wish to make, that may be associated with its Additional Commitment offering. Bidders should note that any additional contractual commitments that it proposes must not negate or impose conditions upon the DDTP's approved contract language contained in the RFP or separately offered to all bidders. Lack of any additional contractual commitments shall be deemed to mean that the Additional Commitments are offered without any additional contract language.

**(5.) Section 4, Cost Data (Optional)**

This section should contain the changes, if any, to the bidder's costs that were proposed in Volume III of its Final Proposal, if the DDTP awards the Additional Commitment offerings. Bidders shall also describe the basis and methodology of the proposed cost adjustments. Lack of any cost data shall be deemed to mean that the Additional Commitments are offered without any cost adjustment.

**(6.) Section 5, Literature (Optional)**

This section should contain any additional supporting literature, information or descriptions that might be referenced in sections 2, 3, or 4 of Volume V.

Additional Commitment offerings shall be evaluated per RFP Section 9.4.7.