

SPECIAL INSTRUCTIONS TO OFFERORS

SOLICITATION NO: ADHS-00003830

1. Pre-Offer Conference:

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

2. Proposal Requirements:

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

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

- 2.1 Table of Contents: The Offeror shall provide page numbers for each section of their proposal;
- 2.2 Executive Summary: A brief overview of the project as described in the Method of Approach. The Executive Summary shall be no more than two (2) pages;
- 2.3 Method of Approach (Methodology):
 - The Offeror shall:
 - 2.3.1 The Offeror shall prepare and submit a written narrative to include at a minimum, the following:
 - 2.3.1.1 The method of approach that will be used to provide the services to perform the Tasks as described in the Scope of Work and Special Terms and Conditions;
 - 2.3.1.2 A detailed description of the projected number of clients the Offeror is able to serve and the areas of the State in which the Offeror intends to provide service;
 - 2.3.1.3 Details related to the scope of any training sessions to be provided including, but not limited to, length of time, materials, equipment and optimal number of attendees per training session;
 - 2.3.1.4 All plans as detailed in the Scope of Work, Requirements section; and
 - 2.3.1.5 Submit three (3) examples of prior projects similar to those as described in this solicitation including but not limited to, a description of the work performed, the method used to complete the project, recommendations made to the client's process and project outcome. The ADHS may not be used as the only example of prior projects; other examples of similar projects shall be included. Provide the name of the organization, contact person, title, telephone number, fax number, address and e-mail address for each example as a reference.

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2.4 Experience and Expertise to include at a minimum:

2.4.1 A description of Offeror’s experience and expertise regarding the services offered including, but not limited to, company history, location, number of years in business, types of services provided, number of current full and part-time employees, and number of current clients. Offeror shall provide a statement of mission, vision and guiding principles for the provision of the services in the Solicitation;

2.4.2 Resumes or curriculum vitae for key personnel, as defined in the Special Terms and Conditions, responsible for delivery of services. Provide resumes for existing staff that will be part of the project and job descriptions for positions to be filled. Describe staff accountabilities and expertise. List how much time each person will spend on the project. Resumes shall include name, title, key responsibilities and previous experiences that are relative to that field. Include all professional licensure, certifications, experience, educational history, professional awards and publications; and

2.4.3 Technical Qualifications: Offerors shall identify a Project Manager who shall be the primary contact person for the ADHS Program Unit Manager in discussing work that needs to be completed. Offerors shall provide a detailed description of the Project Manager’s function and how they will accomplish the minimum tasks listed herein. The Project Manager shall, at a minimum:

2.4.3.1 Serve as a primary day-to-day contact with the ADHS Program Unit Manager;

2.4.3.2 Attend, lead and prepare materials for meetings as requested;

2.4.3.3 Ensure all necessary operational components are completed prior to implementation;

2.4.3.4 Troubleshoot and correct problems after implementation;

2.4.3.5 Designate an alternate contact when the Project Manager is unavailable; and

2.4.3.6 Assure that the Offeror, as well as any subcontractors, fulfill their duties and responsibilities under the Contract; and delivers required documents to the ADHS.

2.4.4 Provide three (3) references including past similar contracts that support your company’s abilities to provide the proposed services. Use the format on Attachment B to include the Contract Title, a description of the services performed, Contract Term/Dates of Work, Reference Company, the Telephone Number, the Contact Person related to the referenced Contract, and the Address. ADHS personnel shall not be provided as a reference.

2.5 Complete Item Pricing (located and completed in ProcureAZ under the Items Tab) by providing hourly rates for:

SERVICE DESCRIPTION	UNIT OF MEASURE
Regular Home Visit	Per Visit
Out of Town Home Visits (All class of visit) Thirty (30) or more miles from start point (home/office)	Per Visit
Out of County Home Visits(All class of visits)	Per Visit
Interim Local Home Visits	Per Visit
Shadowing Local Home Visits	Per Visit
Family Local Home Visits	Per Visit
Multi-Disciplinary Staffing Local Home Visits	Per Visit
NICP/ Other Sponsored Training – Local	Per Person/Per Day
NICP/ Other Sponsored Training - Non Local	Per Person/Per Day
Newborn Screening Follow-up	Per Visit
Low Risk Letter	Per Letter

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- 2.6 Offeror shall print Attachment A, Offer and Acceptance, complete, sign, and upload into the "Attachments Tab" in ProcureAZ;
- 2.7 Offeror shall print Attachment B, References, complete, have authorized reference sign and date, and upload into the "Attachments Tab" in ProcureAZ;
- 2.8 Offeror shall print Attachment C, Notices, Correspondence, Reports and Payments, complete, and upload into the "Attachments Tab" in ProcureAZ;

3. Proposal Opening:

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

4. Responsibility, Responsiveness and Susceptibility:

In accordance with A.R.S. 41-2534(G), A.A.C. R2-7-C311, A.A.C. R2-7-C312 and R2-7-C316, the State shall consider, at a minimum, the following criteria when determining Offeror's responsibility, as well, as the proposal's responsiveness and susceptibility for contract award.

- 4.1 Whether the Offeror has had a contract within the last five (5) years that was terminated for cause due to breach or similar failure to comply with the terms of the contract;
- 4.2 Whether the Offeror's record of performance includes factual evidence of failure to satisfy the terms of the Offeror's agreements with any party to a contract. Factual evidence may consist of documented vendor performance reports, customer complaints and/or negative references; and
- 4.3 Whether the Offeror is legally qualified to contract with the State and the Offeror's financial, business, personnel, or other resources, including subcontractors;
 - 4.3.1 Legally qualified includes if the vendor or if key personnel have been debarred, suspended or otherwise lawfully prohibited from participating in any public procurement activity, including but not limited to, being disapproved as a subcontractor of any public procurement unit or other governmental body.
- 4.4 Whether the Offeror promptly supplied all requested information concerning its responsibility;
- 4.5 Whether the Offer was sufficient to permit evaluation by the State, in accordance with the evaluation criteria identified in this Solicitation or other necessary offer components. Necessary offer components include: attachments, documents or forms to be submitted with the offer, an indication of the intent to be bound, reasonable or acceptable approach to perform the Scope of Work, acknowledged Solicitation Amendments, references to include experience verification, adequacy of financial/business/personal or other resources to include a performance bond and stability including subcontractors and any other data specifically requested in the Solicitation;
- 4.6 Whether the Offer was in conformance with the requirements contained in the Scope of Work, Terms and Conditions, and Instructions for the Solicitation including its Amendments and all documents incorporated by reference;
- 4.7 Whether the Offer limits the rights of the State;
- 4.8 Whether the Offer includes or is subject to unreasonable conditions, to include conditions upon the State necessary for successful Contract performance. The State shall be the sole determiner as to the reasonableness of a condition;
- 4.9 Whether the Offer materially changes the contents set forth in the Solicitation, which includes the Scope of Work, Terms and Conditions, or Instructions; and
- 4.10 Whether the Offeror provides misleading or inaccurate information.

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5. Evaluation Criteria:

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

Exceptions to Terms and Conditions, as stated in the Uniform Instructions Section C.4, will impact an Offeror's susceptibility for award.

5.1 Method of Approach (Methodology),

5.2 Experience and Expertise;

5.3 References; and

5.4 Cost.

6. Discussion:

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

7. Inclusive Offerors:

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

8. Offshore Performance of Work Prohibited:

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

9. Compliance with A.R.S. §41-4401:

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

10. Questions:

All questions regarding this solicitation shall be submitted within the ProcureAZ system no later than five (5) calendar days prior to the RFP due date.