



Request for Response Office of the State Treasurer and Receiver General Massachusetts State Retirement Board

Address: One Winter Street, 8th Floor, Boston, Massachusetts 02108-4747
Telephone #: (617) 367-3900
Internet Address: <http://www.commbuys.com>;
<http://www.mass.gov/treasury/about/procurements>
RFR File Name/Title: State Board of Retirement Election Services 2016
RFR File Number: **TRE RFR SRB ELECTION 2016**
RFR Contact Person: Jameel Moore, E-mail Address: procurements@tre.state.ma.us

SECTION I. SUMMARY AND PURPOSE

The Massachusetts State Retirement Board ("SRB") seeks a vendor to provide election services during 2016 for the election of a Board member by its membership of more than 149,000 active and retired individuals. Desired services may include: designing, printing and distributing voting materials; postage; receiving and verifying returned ballots; tabulating and certifying the final vote; and ability to conduct simultaneous paper, online and telephone balloting.

The SRB is required to periodically conduct an election for the seats held by members who must be elected by our active and retired members for a three-year term. This election occurs in anticipation of the end of the term for an affected Board Member. The SRB is seeking a contractor or contractors to provide services for a 2016 election.

Presently, the SRB's membership consists of more than 88,000 active members, and more than 61,000 retired members and survivors. Based on experience, we estimate a return rate of a minimum of 10 – 15% of eligible voting members; however, we do not guarantee a certain percentage of returns.

SECTION II. GENERAL INFORMATION

To the maximum extent possible, in this Request for Response ("RFR") the Office of the State Treasurer and Receiver-General (the "Treasury") follows the rules and regulations set forth in 801 Code of Massachusetts Regulations ("CMR") 21.00: Procurement of Commodities and Services. All terms, conditions, requirements, and procedures included in this RFR must be met for a response to be qualified as responsive. A response that fails to meet any material term, condition, requirement or procedure of this RFR may be deemed unresponsive and disqualified. The Treasury reserves the right to waive or permit cure of non-material errors or omissions. **The Treasury reserves the right to modify, amend or cancel the terms of the RFR at any time.** Unless otherwise specified, all communications, responses, and documentation regarding this RFR must be in English, all measurements must be provided in feet, inches, and pounds and all cost proposals or figures in U.S. Currency. All responses must be submitted in accordance with the specific terms of this RFR. No electronic responses may be submitted in response to this RFR

Copies of this RFR may be obtained electronically on COMMBUYS (<https://www.commbuys.com>) & on the Treasury website (<http://www.mass.gov/treasury>).

SECTION III. RFR CALENDAR, INSTRUCTIONS & EVALUATION PROCESS

A. RFR CALENDAR / TIMELINE

The following is the tentative time schedule for the SRB's search for a vendor to provide Election Services. All dates are subject to modification by the SRB with notice.

- Issuance of RFR: July 6, 2016
- Bidder Question Deadline July 14, 2016
- Post Answers to Bidder Questions July 21, 2016
- (Posted on: COMMBUYS (<https://www.commbuys.com>) & (<http://www.mass.gov/treasury/about/procurements>)
- **Submission of RFR Response: July 29, 2016**
- Tentative Selection of Vendor: By August 25, 2016
- Nomination Papers Available: August 29, 2016
- Nomination Deadline: September 23, 2016
- Submission of Biographical Data: TBA
- Notice to Qualified Candidates: September 30, 2016
- Ballots Mailed: October 14, 2016 (Standard mail)
- Ballot Deadline: December 2, 2016 (Post-marked; electronic voting ceases at midnight)
- Tentative Election Certification: December 22, 2016

B. INSTRUCTIONS FOR SUBMISSION OF RESPONSES

1. **Response Submission.** The original, and four (4) USB memory sticks (or equivalent USB storage device) of the Bidder's response and attachments must be delivered to the Treasury in the same sealed package no later than 4:00 p.m. EDT on July 29, 2016.

The Cost Proposal may be submitted in the same package as the rest of the response, but must be submitted under separate cover in a separate sealed envelope labeled "Cost Proposal". Do not include the cost proposal on the memory stick or within the original proposal submission. Failure to meet this requirement

may result in disqualification of the bid. Responses and attachments received after this deadline date and time will not be evaluated. A facsimile or e-mail response will not qualify as a “submission” for deadline purposes in advance of or in lieu of a hard copy submission.

Responses and attachments should be delivered to:

Office of the State Treasurer and Receiver General
One Ashburton Place, 12th Floor
Boston, MA 02108-1607
Attn: Jameel Moore, Procurement Analyst/ Associate General Counsel
Re: SRB Election Services 2016

Note: Questions concerning the RFR may be submitted to the RFR Contact Person via email at procurements@tre.state.ma.us. NO PHONE CALLS PLEASE; ALL CALLERS WILL BE ASKED TO EMAIL THEIR CONCERN. Questions and answers from the RFR will be posted on www.commbuys.com.

2. **Response Provisions.** When responding to this RFR, bidders should take note of the following provisions.
 - a. The SRB reserves the right to request additional information from bidders responding to this Request. Additionally, upon reviewing the responses the SRB may decide to hold oral interviews.
 - b. The SRB reserves the right to reject any and all responses to this request, to waive any minor informality in a response, to request clarification of information from any firm responding and to effect any agreement deemed by the SRB to be in the Commonwealth’s best interest with one or more of the firms responding. The SRB reserves the right to amend or cancel this RFR at any time.
 - c. All responses and their contents submitted in response to this RFR shall become the property of the SRB and will not be returned to the Bidder.
 - d. The SRB will not reimburse any Bidder for any costs associated with the preparation or submittal of any response to this request or for any travel and/or per diem incurred in any presentation of such responses.
 - e. The narrative response should address all items included in each section of the non-cost proposal response (referred to as the Technical Response).
3. **Disqualification of Responses.**
 - a. Late Proposals: Proposals that are received after the deadline date and time shall be automatically disqualified.
 - b. Nonresponsive Proposals: Proposals which are not responsive or which fail

to comply with mandatory requirements of the RFR shall be deemed nonresponsive and shall be disqualified. The Treasury reserves the right to waive or permit cure of non-material errors or omissions. Nonresponsive proposals shall include, but not be limited to those, which fail to address or meet any mandatory item, and those submitted in insufficient number, or in incorrect format.

- c. **Collusion**: Collusion by two or more bidders agreeing to act in a manner intended to avoid or frustrate fair and open competition is prohibited and shall be grounds for rejection or disqualification of a proposal or termination of this contract.
- d. **Debarred Bidders or Subcontractors**: A bidder who is currently subject to any Commonwealth or federal debarment order or determination, shall not be considered for evaluation by the PMT. If a bidder's proposal is dependent upon the services of a named subcontractor and the disqualification of this named subcontractor would materially alter the proposal, then that proposal shall be deemed unresponsive if the named subcontractor is found to be debarred. Proposals that indicate that subcontractors will be used but do not rely on any specifically named subcontractor shall not be deemed unresponsive if the disqualification of a proposed subcontractor will not materially alter the proposal.

C. RFR Evaluation Process

1. **Evaluation Process**. The RFR Evaluation Process will be conducted in three phases. A review team consisting of staff from the Treasury will complete the Phase One Review for all proposal submissions. The purpose of the Phase One Review is to eliminate any bids that are non-responsive to the requirements of the RFR. Bids that are deemed to be qualified based on the Phase One Review will be submitted to the PMT for additional review. The PMT, consisting of staff from the SRB, will make a recommendation to the State Retirement Board who will then accept or reject the recommendation. The State Retirement Board, Chaired by the State Treasurer will make the final selection decision.

(Phase One, Phase Two and Phase Three of this RFR will be Evaluated Separately)

- a. **Phase One Review**: Bidders responses will be reviewed based on listed criteria, completeness of response, including mandatory attachments and compliance to submission criteria (See Section V. Phase One Requirements). Bids that do not comply with these components will be rejected and will not proceed to Phase Two Review. SRB Staff will conduct this portion of the review. Please be aware that if any Bidder does not meet a Phase One requirement, SRB Staff reserves the right to allow that bidder to cure.
- b. **Phase Two Review**: In this phase, proposals will be evaluated based upon the proven ability of the vendor to satisfy the requirements and qualifications necessary to perform the requested services in a cost-effective manner.

Criteria	Weight
Methodology	40%
Experience	40%
Firm Overview	10%
Treasury Supplier Diversity	5%
Invest in Mass	5%

- c. **Phase Three Review**: Cost will be evaluated in relationship to the Phase Two Review and scoring of bidder's responses. The Phase Two score will represent 60% and the Phase Three Cost score will represent 40% of the total score. The successful bid will be determined based on the one that represents the "best value" overall and achieves the procurement goals.

- 60% Phase Two Technical Review
(Responses to Scope of Services questions)
- 40% Phase Three Cost

The Cost Proposal must be submitted under separate cover from the Technical Proposal in a separate sealed envelope. Failure to meet this requirement may result in disqualification of the bid.

2. **Oral Presentations / Interviews**. After completion of Phase One and Phase Two, but prior to Phase Three, the PMT shall have the option to invite all, some or none of the bidders to make oral presentations. Oral presentations provide the PMT with an opportunity to evaluate a bidder through the presentation of their proposal. The PMT may limit the number of oral presentations conducted. Bidders will not be informed of their rank at the time of the oral presentations.

The time allotments and the format shall be the same for all oral presentations. The PMT will give notice of at least three (3) business days prior to the date of an oral presentation. The PMT may waive the location and medium requirements of an oral presentation upon the written request of a bidder due to special hardships, such as a bidder with disabilities, limited resources, or logistic restraints. In these circumstances the PMT may conduct oral presentations through an alternative written or electronic medium (e.g., telephone, video conference, TTY or Internet). The PMT may require the bidder's assigned key personnel to conduct the oral presentation.

A bidder is limited to the presentation of material contained in its proposal, with the limited exception that a bidder may address specific questions posed by the PMT or provide clarification of information contained in its proposal. Any correction or modification of the proposal or the presentation of supplemental information shall be considered prejudicial to the interests of other bidders and fair competition and shall not be permitted. A bidder's attempt to submit such corrections, modifications or supplemental information during an oral presentation may subject the bidder's proposal to disqualification. A bidder's failure to agree to an oral presentation may result in disqualification from further consideration. Oral presentations may be recorded by the Treasury as a matter of public record. Any material submitted at the

oral presentation, shall be subject to public records law.

3. **On-Site Visits (Optional).** The PMT reserves the right to conduct on-site inspections of any or all bidder locations at any time prior to the awarding of this contract to verify the bidder's ability to perform the services required. The PMT shall schedule the time of these site visits and shall provide notice of at least three business days before a visit. Failure to agree to a site visit may result in disqualification of a bidder's proposal.

SECTION IV. SPECIFICATIONS, REQUIREMENTS & COMPONENTS

By submitting a Response to the RFR, the Bidder agrees to and agrees to comply with all of the RFR required specifications, components and requirements listed below in Sections IV A & B:

A. RFR REQUIRED SPECIFICATIONS

1. **Alternatives.** A response which fails to meet any material term or condition of the RFR, including the submission of required attachments, may lose points or be deemed unresponsive and disqualified. Unless otherwise specified, Bidders should submit responses proposing alternatives that provide equivalent, better or more cost-effective performance than achievable under the stated RFR specifications. These alternatives may include related services that may be available to enhance performance during the period of the contract. The response should describe how any alternative achieves substantially equivalent or better performance to that of the RFR specifications. The SRB will determine if a proposed alternative method of performance achieves substantially equivalent or better performance. The goal of this RFR is to provide the best value of commodities and services to achieve the procurement goals of the SRB. Bidders that propose discounts, uncharged commodities and services or other benefits in addition to the RFR specifications may receive a preference or additional points under this RFR as specified.
2. **Best Value Selection and Negotiation.** The PMT and/or the State Treasurer may select the response(s) that demonstrates the "Best Value" overall.
3. **Bidder Communication.** Bidders are prohibited from communicating directly with any employees of the Treasury or any member of the PMT regarding this RFR and may be disqualified for doing so at the determination of the PMT, except as specified in this RFR, and no other individual Commonwealth employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFR. Bidders may communicate with the contact person for this RFR in the event this RFR is incomplete or the Bidder is having trouble obtaining any required attachments electronically through COMMBUYS (<https://www.commbuys.com>).
4. **Brand Name or Equal.** Unless otherwise specified in this RFR, any reference to a particular trademark, trade name, patent, design, type, specification, producer or supplier is not intended to restrict this RFR to any manufacturer or proprietor or to constitute an endorsement of any service. The SRB will consider clearly identified offers of substantially equivalent services submitted in response to such reference.

5. **COMMBUYS Market Center.** COMMBUYS is the official source of information for this RFR and is publicly accessible at no charge at www.commbuys.com. Information contained in this document and in COMMBUYS, including file attachments, and information contained in the related Bid Questions and Answers (Q&A), are all components of the RFR, as referenced in COMMBUYS, and are incorporated into the RFR and any resulting contract. Bidders are solely responsible for obtaining all information distributed for this RFR via COMMBUYS. RFR Q&A supports Bidder submission of written questions associated with a RFR and publication of official answers.

It is each Bidder's responsibility to check COMMBUYS for:

- Any amendments, addenda or modifications to this RFR, and
- Any RFR Q&A records related to this RFR.

The Commonwealth accepts no responsibility and will provide no accommodation to Bidders who submit a response based on an out-of-date RFR or on information received from a source other than COMMBUYS.

Bidders may not alter (manually or electronically) the RFR language or any RFR component files. Modifications to the body of the RFR, its specifications, or terms and conditions, which change the intent of this RFR are prohibited and may disqualify a response.

6. **COMMBUYS Subscription.** Bidders may elect to obtain a free COMMBUYS Seller subscription which provides value-added features, including automated email notification associated with postings and modifications to COMMBUYS records.

All Bidders submitting a response to this RFR agree that, if awarded a contract: (1) they will maintain an active seller account in COMMBUYS; (2) they will, when directed to do so by the procuring entity, activate and maintain a COMMBUYS-enabled catalog using Commonwealth Commodity Codes; (3) they will comply with all requests by the procuring entity to utilize COMMBUYS for the purposes of conducting all aspects of purchasing and invoicing with the Commonwealth, as added functionality for the COMMBUYS system is activated; (4) Bidder understands and acknowledges that all references to the Comm-PASS website or related requirements throughout this RFR, shall be superseded by comparable requirements pertaining to the COMMBUYS website; and (5) in the event the Commonwealth adopts an alternate market center system, successful Bidders will be required to utilize such system, as directed by the procuring entity. Commonwealth Commodity Codes are based on the United Nations Standard Products and Services Code (UNSPSC).

The COMMBUYS system introduces new terminology, which bidders must be familiar with in order to conduct business with the Commonwealth. To view this terminology and to learn more about the COMMBUYS system, please visit the COMMBUYS Resource Center.

7. **Conflict of Interest.** Prior to award of any contract, the Bidder/Vendor shall certify in writing to the procuring agency that no relationship exists between

the Bidder/Vendor and the procuring or contracting agency that interferes with fair competition or is a conflict of interest, and no relationship exists between the Bidder/Vendor and another person or organization that constitutes a conflict of interest with respect to a state contract. No official or employee of the Commonwealth who exercises any function or responsibility in the review or approval of the undertaking or carrying out of this project shall, prior to the completion of the project, voluntarily acquire any personal interest, either directly or indirectly, in this contract or proposed contract.

The Bidder shall provide assurance that it presently has no interest and shall not acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of its services hereunder. The Bidder shall also provide assurances that no person having any such known interests shall be employed during the performance of this contract.

8. **Costs.** Costs that are not specifically identified and defined in the Bidder's response, and accepted by the SRB as part of a Contract, will not be compensated under any Contract awarded pursuant to this RFR. The Commonwealth will not be responsible for any costs or expenses incurred by Bidders responding to this RFR.
9. **Electronic Communication/Update of Bidder's/Contractor's Contact Information.** It is the responsibility of the prospective Bidder and awarded Contractor to keep current the E-mail address of the Bidder's contact person and prospective contract manager, if awarded a contract, and to monitor that E-mail inbox for communications from the PMT, including requests for clarification. The PMT and the Commonwealth assume no responsibility if a prospective Bidder's/awarded Contractor's designated E-mail address is not current, or if technical problems, including those with the prospective Bidder's/awarded Contractor's computer, network or Internet service provider (ISP) cause E-mail communications sent to/from the prospective Bidder/awarded Contractor and the PMT to be lost or rejected by any means including E-mail or spam filtering.
10. **Environmental Response Submission Compliance.** In an effort to promote greater use of recycled and environmentally preferable products and minimize waste, all responses submitted should comply with the following guidelines:
 - All copies should be printed double sided.
 - All submittals and copies should be printed on recycled paper with a minimum post-consumer content of 30% or on tree-free paper (i.e., paper made from raw materials other than trees, such as kenaf). To document the use of such paper, a photocopy of the ream cover/wrapper should be included with the response.
 - Unless absolutely necessary, all responses and copies should minimize or eliminate use of non-recyclable or non-reusable

materials such as plastic report covers, plastic dividers, vinyl sleeves, and GBC binding. Three ringed binders, glued materials, paper clips, and staples are acceptable.

- Bidders should submit materials in a format which allows for easy removal and recycling of paper materials.
- Bidders are encouraged to use other products that contain recycled content in their response documents. Such products may include, but are not limited to, folders, binders, paper clips, diskettes, envelopes, boxes, etc. Where appropriate, bidders should note which products in their responses are made with recycled materials.
- Unnecessary samples, attachments, or documents not specifically asked for should not be submitted.

11. Estimated Provisions. The SRB makes no guarantee that any commodities or services will be purchased from any contract resulting from this RFR. Any estimates and/or past or current procurement volumes referenced in this RFR are included only for the convenience of Bidders, and are not to be relied upon as any indication of future purchase levels.

12. Minimum Bid Duration. Bidder responses/bids made in response to this RFR must remain in effect for 120 days from the date of bid submission.

13. Public Records. All responses and information submitted in response to this RFR are subject to the Massachusetts Public Records Law, Massachusetts General Laws (“M.G.L.”), Chapter 66, Section 10, and Chapter 4, Section 7, Subsection 26. Any statements in submitted responses (and/or oral presentation/interview materials) that are inconsistent with these statutes will be disregarded. Bidders are advised that all proposals are deemed sealed, and therefore their contents will be treated as confidential and will not be disclosed to competing Bidders until the evaluation process has been completed, the contract has been awarded and negotiations are finalized.

14. Reasonable Accommodation. Bidders with disabilities or hardships that seek reasonable accommodation, which may include the receipt of RFR information in an alternative format, must communicate such requests in writing to the RFR contact person. Requests for accommodation will be addressed on a case-by-case basis. A Bidder requesting accommodation must submit a written statement which describes the Bidder’s disability and the requested accommodation to the contact person for the RFR. The PMT reserves the right to reject unreasonable requests

15. Restriction on the Use of the Commonwealth Seal. Bidders and contractors are not allowed to display the Commonwealth of Massachusetts Seal in their bid package or in any subsequent marketing materials if they are awarded a contract. Use of the coat of arms and the Great Seal of the Commonwealth for advertising or commercial purposes is prohibited by law.

- 16. Prohibition Against Selling or Distributing Information.** Any Bidder awarded a contract under this RFR is prohibited from selling or distributing any information collected or derived from the contract and/or procurement process, including lists of participating or eligible Commonwealth of Massachusetts employee names, telephone numbers, email addresses or mailing addresses.

B. COMPONENTS OF PROCUREMENT

- 1. Duration and Renewal Options.** The SRB intends to enter into a contract for election services and related activities with the selected bidder(s) for up to a two-year period. The SRB may, at its option, extend the contract for a period up to one year, under the same or better terms and conditions as negotiated.

2. Acquisition Method.

<input type="checkbox"/> Outright Purchase	<input checked="" type="checkbox"/> Fee for Service
<input type="checkbox"/> License	<input type="checkbox"/> Tax-exempt Lease Purchase
<input type="checkbox"/> Lease Purchase	<input type="checkbox"/> Term Lease
<input type="checkbox"/> Rental (not to exceed 6 months)	<input type="checkbox"/> Other (specify)

3. Single or Multiple Contracts.

The SRB reserves the right to award contracts to a single vendor or multiple vendors, in the best interest of the Treasury.

The contractor must agree to cooperate with such other contractors, and must not commit or permit any act that may interfere with the performance of work by any other contractor.

4. CONTRACT GUIDELINES

<input checked="" type="checkbox"/> Only Office of the SRB/Treasury may contract under RFR
<input type="checkbox"/> Option to allow other Departments/political subdivisions to contract under RFR
<input type="checkbox"/> Statewide Contract
<input type="checkbox"/> Multi-Office of the State Treasurer and Receiver General User Contract
<input type="checkbox"/> Pre-Qualification List

5. ANTICIPATED EXPENDITURES, FUNDING OR COMPENSATION FOR EXPECTED DURATION.

Subject to selected bidder's quotes and rates, subject to negotiation.

6. CONTRACT PERFORMANCE AND BUSINESS SPECIFICATIONS

a. Evaluation and Selection of Contractor

The SRB shall have sole authority to evaluate and make the final selection of bidder(s) for contract negotiation(s) pursuant to this RFR. The selection will be

made after evaluation of both business and cost proposals by the PMT and final approval by the SRB.

b. Change in Terms

The SRB reserves the right to modify the specifications identified in the RFR at any time prior to the closing date. The SRB reserves the right to negotiate with the selected bidder(s) as to any element of cost or performance, including without limitation, elements identified in the RFR and/or the selected bidder's response in order to achieve the best value for the Commonwealth.

c. Termination or Suspension

Contractor's services may be terminated or suspended from the SRB's contract for poor performance, failure to perform, fraud or other cause with two (2) weeks prior written notice by the SRB. Contractors may be terminated from the contract without cause with thirty (30) days prior written notice. The Contractor may not terminate the contract or performance thereunder except upon a minimum of 180 days written notice to the SRB. Other terms regarding contract termination are subject to negotiation between the selected bidder(s) and the SRB.

d. Permits and Compliance

The contractor shall procure and pay for all permits, licenses and approvals necessary to perform the services solicited in this RFR. The contractor shall comply with all applicable laws, ordinances, rules, orders and regulations related to the performance of the services solicited. The SRB may, at its option, request documentation evidencing the contractor's compliance.

e. Rejection of Proposals

The SRB reserves the right to reject any and all proposals submitted under this solicitation.

**f. Fees Subject to Office of the State Treasurer and Receiver General
Signatory Authorization**

All fees must be approved by the State Treasurer and Receiver General or his designee and are subject to verification of performance.

g. Confidentiality Policy Regarding Bidder's Support Staff and/or Vendors

The SRB may require Bidder's support staff or outside vendors to sign a confidentiality agreement for the confidential information they will have access to.

h. Subcontracting Policies

Prior approval of the department is required for any subcontracted service of the contract. Contractors are responsible for the satisfactory performance and

adequate oversight of its subcontractors. Human and social service subcontractors are required to meet the same state and federal financial and program reporting requirements and are held to the same reimbursable cost standards as contractors.

i. Contract Expansion

If additional funds become available during the contract duration period, the department reserves the right to increase the maximum obligation to some or all contracts executed as a result of this RFR or to execute contracts with contractors not funded in the initial selection process, subject to available funding, satisfactory contract performance and service or commodity need.

j. Concurrent Contracts Running (Renewals and Transitions)

The SRB shall cancel the contract if funds are not appropriated or otherwise made available to support continuation of performance in any fiscal year succeeding the first year or if satisfactory performance by the contractor does not ensue. The SRB will also have the right to sole discretion in exercising an option to renew, which will not be subject to contractor acceptance or agreement. Any assistance required for this transition must be provided in a smooth and timely manner. If at any time the contract is canceled, terminated or expires, and a contract is subsequently executed with a firm other than the Contractor, the Contractor has the affirmative obligation to assist in the smooth transition of contract services to the subsequent Contractor.

k. Submission of Proposal Materials

All materials, representations and submissions made within the proposal are subject to becoming part of the contract binding the selected Bidder to uphold the materials, representations and submissions made by the selected Bidder within the proposal and at the oral presentations.

SECTION V. PHASE ONE REQUIREMENTS

Compliance with all criteria listed below is mandatory in order for a bid to be accepted for further review. Lack of compliance will automatically disqualify the bidder.

A. LEGAL AND OTHER REQUIREMENTS

As required in the Response Template pages 5 – 6.

B. MANDATORY ATTACHMENTS AND ENCLOSURES

Phase One of the bidder's response shall include the completed mandatory attachments listed in the response template pages 10 - 19. All mandatory attachments should be signed by an individual with the authority to bind the Bidder Firm as indicated on the Contractor Authorized Signatory Listing document included in the Response Template, and the "originals" should have an original signature in blue ink.

SECTION VI. SCOPE OF SERVICES & PHASE TWO QUESTIONNAIRE

A. SCOPE OF SERVICES

An individual or entity providing election services may be hired to assist the SRB if elections for Board Members are held in 2017 and 2018. These are contingent services; whether an election will be held is at the SRB's discretion. The successful candidate must have substantial experience in providing ongoing professional election services, support, development, and modifications related to board elections.

B. REQUIREMENTS

1. MANDATORY COVER LETTER

Each proposal submission must be accompanied by a cover letter.

- The letter, which shall be considered an integral part of the submission, shall be signed by an individual who is authorized to bind the firm contractually, giving his or her title.
- The letter must certify that all of the information contained in the submission is accurate and complete. Inaccurate or incomplete information might affect the submission adversely.
- The letter shall contain a statement to the effect that it constitutes an offer to provide the services requested subject to acceptance of compensation levels determined in accordance with this RFR.
- The letter shall also state that the proposal was prepared solely by the firm and, prior to the time at which it became due, it was not discussed with any individual outside of the firm, other than as specifically contemplated by this RFR.
- The letter shall contain the name, phone number, mail address and email address of the firm contact for this procurement.

2. INFORMATION REQUESTED

- a. Please provide a general description of the firm, its history, significant changes in its makeup over the last three (3) years, and its range of business. Please provide a detailed listing, which may be presented in tabular form as an exhibit or appendix to your submission.
- b. Please indicate whether your firm intends to use the services of other vendors. Indicate the nature of such arrangements, and include the names and resumes of the aforementioned with your response.
- c. Please provide a detailed copy of your firm's equal employment opportunity policy.

3. SPECIFIC INFORMATION

- a. Please discuss your firm's proposed staffing for this engagement, if selected, providing a brief resume for each such employee, and the particular responsibilities of each such employee with respect to this matter. The naming of such persons shall be considered to be a commitment by the firm to assign those individuals to provide election services to the SRB if the firm is the successful bidder. Please indicate the number of minorities and/or women that are included within your proposed professional staffing for this engagement.
- b. Please describe up to five other engagements since January 1, 2013, most relevant to this RFR in which one or more of the employees named in response to question 3(a) above had principal responsibility. In this regard, please provide the client's name, client contact and telephone number.
- c. Please describe your project methodology and how you will apply it to this project. Include how your methodology would ensure that the business requirements would be met.
- d. Alternatives that provide equivalent, better or more cost-effective performance than achievable under the stated RFR specifications.

SECTION VII. COST PROPOSAL

The Cost Proposal must be submitted under separate cover from the Technical Proposal in a separate sealed envelope. Failure to meet this requirement may result in disqualification of the bid.

1. Please provide a description of your firm's fee structure, including the billing rates for your employees who will represent the SRB with respect to these election services.
2. Please use the following chart to provide a detailed breakdown of all costs associated with the services for an election conducted solely using mailed ballots, including printing and distributing the voting packages, receiving and verifying ballots, and tabulating and certifying the results. You may also include your own quote worksheet, but please be sure to indicate your costs on this sheet.

COMPANY: _____
REPRESENTATIVE: _____
SIGNATURE: _____
DATE: _____

Category Item Estimated Cost

1. Printing: Window envelope (150,000)
\$ _____
2. Printing: Ballot return envelope (150,000)
\$ _____
3. Printing: Instructions/candidate profile brochure (150,000)
\$ _____
4. Printing: Ballot (your preferred format; please describe): _____

\$ _____
5. Data processing and Mailing Services: Preparing 150,000 voting packages; inserting ballot and instructions/candidate profile brochure; sorting to achieve lowest possible postage rate
\$ _____
6. Postage: Approximately 150,000 pieces via first-class or standard presort
\$ _____
7. Tabulation Services: Receive, open and tabulate ballots returned by mail (estimated 10-15% returns) and verify and certify election returns (any applicable cost adjustments if percentage of returned ballots varies from the estimated 10-15% returns)
 - a. The Board requests cost proposals addressing the costs that would be incurred if the election were conducted solely by mail and telephone, assuming that approximately 150,000 votes will be tallied. Please itemize the costs that would be associated with staffing a mail and telephone election, and for tabulating and certifying election results.
 - b. The Board also requests cost proposals addressing what costs would be incurred if the election were conducted solely by mail and electronic means, assuming that approximately 150,000 votes will be tallied. Please itemize the costs that would be associated with preparing for a telephone and web- based election, and for tabulating and certifying the election results.
 - c. The Board requests that bidders also provide cost estimates that indicate what costs would be incurred if voters were offered a choice to submit bids through any combinations of mail, telephone and electronic means. Please provide an itemized estimate of these costs.

\$ _____