

STATE OF OREGON



COVER PAGE

Department of Administrative Services – Procurement Services

IT HARDWARE VALUE ADDED RESELLER (IT HVAR)

Request for Proposal (RFP)

DASPS-2143-15

Date of Issue: April 9, 2015

Closing: May 18, 2015 @ 2:00 PM

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SECTION 1: GENERAL INFORMATION

1.1 INTRODUCTION

The State of Oregon, acting by and through the Department of Administrative Services, (“Agency”), is issuing this Request for Proposals to establish a statewide Price Agreement for an IT Hardware Value Added Reseller (IT HVAR) for use by Authorized Purchasers (AP).

Agency intends to award one or more Price Agreement(s) from this RFP, as in the best interest of the State. The initial term of the Price Agreement is anticipated to be 2 years with options to renew.

1.2 SCHEDULE

The table below represents a tentative schedule of events. All times are listed in Pacific Time. All dates listed are subject to change.

	Event	Date / Time
Round 1	RFP Advertised	<i>As stated on the cover page</i>
	Pre-Proposal Conference	April 21, 2015 @ 9:30 AM
	Questions / Requests for Clarification Due	April 23, 2015 @ 2:00 PM
	Answers / Clarification Issued (approx.)	April 28, 2015
	RFP Protest Period Ends	April 30, 2015 @ 2:00 PM
	Closing (Proposals Due)	<i>As stated on the cover page</i>
	Evaluation Period	May 19 –26, 2015
	Notice of Competitive Range	May 26, 2015
	Competitive Range Protest Period Ends	Seven calendar days after notice @ 2:00 PM
Round 2	Questions / Requests for Clarification Due	June 4, 2015
	Answers / Clarification Issued (approx.)	June 9, 2015
	Round 2 Closing (Submissions Due)	June 24, 2015 @ 2:00 PM
	Evaluation Period	June 25 – July 9, 2015
	Notice of Competitive Range	July 10, 2015
	Competitive Range Protest Period Ends	Seven calendar days after notice @ 2:00 PM
Round 3	Submission Requirements Posted	July 22, 2015
	Demonstration / Evaluation	July 23 & 24, 2015
	Questions / Requests for Clarification Due	July 27, 2015
	Answers / Clarification Issued (approx.)	July 29, 2015
	Round 3 Closing (Cost Proposals Due)	July 31, 2015
	Notice of Intent to Award	August 3, 2015

Award Protest Period Ends	Seven calendar days after notice @ 2:00 PM
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1.3 SINGLE POINT OF CONTACT (SPC)

The SPC for this RFP is identified on the Cover Page, along with the SPC’s contact information. Proposer shall direct all communications related to any provision of the RFP, whether about the technical requirements of the RFP, contractual requirements, the RFP process, or any other provision only to the SPC.

SECTION 2: AUTHORITY, OVERVIEW, AND SCOPE

2.1 AUTHORITY AND METHOD

Agency is issuing this RFP pursuant to its authority under OAR 125-246-0170(3).

Agency is using the Competitive Sealed Proposals method, pursuant to ORS 279B.060 and OAR 125-247-0260. Agency may use a combination of the methods for Competitive Sealed Proposals, including optional procedures: a) Competitive Range; b) Discussions and Revised Proposals; c) Revised Rounds of Negotiations; d) Negotiations; e) Best and Final Offers; and f) Multistep Sealed Proposals.

2.2 DEFINITION OF TERMS

For the purposes of this RFP, capitalized words will refer to the following definitions.

2.2.1 General Definitions

Capitalized terms not specifically defined in this document are defined in OAR 125-246-0110.

2.2.2 Project Specific Definitions

AP: Authorized Purchasers are those entities authorized to purchase under a Department Price Agreement. Authorized Purchasers include state agencies, ORCPP members, and other units of local government.

ORCPP: The Oregon Cooperative Purchasing Program is a program of qualified agencies and organizations authorized to purchase the Goods and Services available under a Department Price Agreement.

2.3 OVERVIEW

2.3.1 Agency Overview and Background

The mission of the Department of Administrative Services (DAS) is to serve state government to benefit the people of Oregon. Procurement Services, an office within DAS, supports this mission by establishing and administering statewide price agreements for Goods and Services. Procurement Services currently manages over 250 statewide Price Agreements and numerous agency specific contracts.

2.3.2 Project Overview and Background

2.3.2.1 Timeline

2004-2009: Oregon established three price agreements for computer hardware and two price agreements for computer peripherals. The hardware agreements were awarded to CTL, HP, and Lenovo, the peripherals agreements were awarded to CDW-G and Disys.

2009-2015: Oregon partnered with several states in coordination with the Western States Contracting Alliance (“WSCA”) to meet its hardware and peripheral needs. WSCA established 21 master agreements directly with manufacturers for six categories of products. During the term of this agreement, Oregon entered into a total of 16 participating addenda.

2.3.2.2 Historical Data

Attachment G includes some historical information on spend, shipping destinations, and order time that Agency has been able to gather. Agency provides this information to give Proposer some context; Agency does not guaranty the level of spend under the Price Agreement to be awarded under this RFP.

2.3.3 Purpose

The Price Agreement resulting from this RFP will be for use by all APs to purchase hardware products and related services. In addition to purchasing the hardware products and related services, Agency would like the Price Agreement to include an option to lease or otherwise finance the hardware products and related services.

The scope of hardware and Services to be made available under the Price Agreement will be established in the Description of Hardware and Services section of the RFP, as well as the Manufacturer Selection Process and ordering processes and procedures. The Price Agreement must permit APs to place orders via purchase order, through IT HVAR’s website, or by other methods.

Related Services: Services may not be acquired as a stand-alone. All Service must accompany a purchase of hardware. Services must be those that the original equipment manufacturer would provide or perform for any purchaser. Additional restrictions may be established in the ordering instructions (based on policy, procedure, direction, etc.) rather than in the scope, allowing the resulting Price Agreement to be adjusted as needed as time moves forward. Additional restrictions may include:

- Limitation of what products may be purchased
- Additional process requirement prior to purchase
- Limitation of the amount of services requiring a statement of work

2.3.4 Manufacturer Selection Process, Large Purchases

APs not subject to DAS procurement authority may select the manufacturer using their own manufacturer selection method.

For all purchases or leases over \$10,000, APs subject to DAS procurement authority shall select the manufacturer using one of the following Manufacturer Selection Methods:

2.3.4.1 Brand Name Justification

A documented brand name justification in compliance with applicable statute and rule.

2.3.4.2 Best Value Analysis

Submit the minimum specifications of the AP’s need to the IT HVAR requesting a quote of the available options. Determine best value based on, but not limited to the following:

- Price
- Availability
- Past performance
- Compatibility

2.3.5 Manufacturer Selection Process, Small Purchases

For purchases under \$10,000, APs may select the manufacturer of its choice in compliance with applicable statute and rule.

2.4 DESCRIPTION OF HARDWARE AND SERVICES

The Price Agreement will allow APs to buy or lease products and services, regardless of manufacturer, in the following categories:

Description of Hardware and Services of IT Hardware Value Added Reseller (IT HVAR)					
Categories		Definition	Examples	Restrictions	
PRIMARY CATEGORIES	1	COMPUTING	Device or system whose primary purpose is computing	desktop, laptop, tablet, all-in-one, two-in-one, server, mainframe, etc.	Usage restrictions may be established in the price agreement.
	2	NETWORKING	Device or system whose primary purpose is networking.	local area network (LAN), wide area network (WAN) , switch, load balancer, router, firewall, hub, etc.	Usage restrictions may be established in the price agreement.
	3	STORAGE	Device or system whose primary purpose is storage.	storage area network (SAN), network attached storage (NAS), direct attached storage (DAS), etc.	Usage restrictions may be established in the price agreement.
	4	CONVERGED INFRASTRUCTURE	Device or system whose primary purpose is a combination of two or more of the primary categories.	VBlock, Nutanix, SimpliVity, etc.	Usage restrictions may be established in the price agreement.
SECONDARY CATEGORIES	5	PERIPHERALS	An item that can be attached to, added within, or networked with one of the four primary categories of products.	multi-function devices, printer, label printer, scanner, display devices (monitor, projector, etc.), input devices (keyboard, mouse, trackball, etc.), uninterruptible power supplies (UPS), power strip, surge protection, charger, etc.	Usage restrictions may be established in the price agreement.
	6	CONSUMABLES	Products that are used up in the normal course of using one of the primary or secondary categories of products.	batteries, disks, flash drives, toner, ink cartridges, etc.	Usage restrictions may be established in the price agreement.
	7	SERVICES	Business or technical expertise provided to assist with the creation, management, and optimization of information and business processes.	installation, configuration, training and support/maintenance	Usage restrictions may be established in the price agreement.
	8	SOFTWARE	Software necessary for a primary category device or system to operate.	Operating system software, or other OEM software that is ONLY available pre-installed.	Software that is available for purchase not pre-installed.

The IT HVAR will also provide a variety of additional contract management services at no additional cost.

SECTION 3: PROCUREMENT REQUIREMENTS AND EVALUATION

3.1 MINIMUM REQUIREMENTS

To be considered for evaluation, Proposal must demonstrate how Proposer meets all requirements of this section:

3.1.1 Minimum Proposer Requirements

Proposer must certify in Attachment D its capability to meet the following requirements:

3.1.1.1 CAPABILITY

Proposer must have the capability to be the single IT HVAR, for all APs. This includes the full range of products and related services under the scope of this RFP.

3.1.1.2 AUTHORIZED

Proposer must be able to meet the product needs of APs. If selected as the IT HVAR, Proposer shall maintain business relationships with a broad spectrum of manufacturers establishing new relationships over time as technology evolves.

3.1.1.3 EXPERIENCE

Proposer must have 5 years' experience being a large-scale IT HVAR, having supported a large account with similar purchasing volume as Oregon's.

3.1.1.4 VOLUME

Proposer must have an average of \$500 million in sales per calendar year over the last 5 years.

3.2 MINIMUM SUBMISSION REQUIREMENTS

3.2.1 Proposal Format and Quantity

Proposal should follow the format and reference the sections listed in the Proposal Content Requirements section. Responses to each section and subsection should be labeled to indicate the item being addressed. Proposal must describe in detail how requirements of this RFP will be met and may provide additional related information.

Proposer shall submit one electronic copy of its Proposal in one of the following formats: Adobe Acrobat (pdf), Microsoft Word (docx), or Microsoft Excel (xlsx). Some forms may specify a specific format requirement for their submission. In addition, if Proposer believes any of its Proposal is exempt from disclosure under Oregon Public Records Law (ORS 192.410 through 192.505), Proposer shall complete and submit the Affidavit of Trade Secret (Attachment B) and a fully redacted version of its Proposal, clearly identified as the redacted version.

3.2.2 Authorized Representative

A representative authorized to bind the Proposer shall sign the Proposal. Failure of the authorized representative to sign the Proposal may subject the Proposal to rejection by Agency.

3.3 ROUND 1 PROCUREMENT PROCESS

Round 1 consists of submitted Written proposals, some sections evaluated mathematically, some sections independently evaluated by Evaluation Committee members.

3.3.1 Public Notice

The RFP, including all Addenda and attachments, is published in the Oregon Procurement Information Network (ORPIN) at <http://www.orpin.oregon.gov>. RFP documents will not be mailed to prospective Proposers.

Agency shall advertise all Addenda on ORPIN. Prospective Proposer is solely responsible for checking ORPIN to determine whether or not any Addenda have been issued. Addenda are incorporated into the RFP by this reference.

3.3.2 Questions / Requests for Clarification

All inquiries, whether relating to the RFP process, administration, deadline or method of award, or to the intent or technical aspects of the RFP must:

- Be emailed to the SPC
- Reference the RFP number
- Identify Proposer's name and contact information
- Be sent by an authorized representative
- Refer to the specific area of the RFP being questioned (i.e. page, section and paragraph number); and
- Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule

3.3.3 Pre-Proposal Conference

A pre-Proposal conference will be held at the date and time listed in the Schedule. Prospective Proposers' participation in this conference is highly encouraged but not mandatory.

The purpose of the pre-Proposal conference is to:

- Provide additional description of the project;
- Explain the RFP process; and
- Answer any questions Proposers may have related to the project or the process.

Statements made at the pre-Proposal conference are not binding upon Agency. Proposers may be asked to submit questions in Writing.

3.3.3.1 Attendance at Pre-Proposal Conference

Physical attendance information:

State of Oregon - Department of Administrative Services
Mt. Neahkahnie Conference Room
1225 Ferry Street SE
Salem, OR 97301

Teleconference information:

Meeting Number(s): 888-363-4734 or 215-446-3656
Access Code: 3162711

3.3.4 Solicitation Protests

3.3.4.1 Protests to RFP

Prospective Proposer may submit a Written protest of anything contained in this RFP, including but not limited to, the RFP process, Specifications, Scope of Work, and the proposed Price Agreement. This is prospective Proposer's only opportunity to protest the provisions of the RFP, except for protests of Addenda or the terms and conditions of the proposed Price Agreement, as provided below.

3.3.4.2 Protests to Addenda

Prospective Proposer may submit a Written protest of anything contained in the respective Addendum. Protests to Addenda, if issued, must be submitted by the date/time specified in the respective Addendum, or they will not be considered. Protests of matters not added or modified by the respective Addendum will not be considered.

3.3.4.3 Protests must:

- Be emailed to the SPC
- Reference the RFP number
- Identify prospective Proposer's name and contact information
- Be sent by an authorized representative
- State the reason for the protest, including:
 - the grounds that demonstrate how the Procurement Process is contrary to law, Unnecessarily Restrictive, legally flawed, or improperly specifies a brand name; and
 - evidence or documentation that supports the grounds on which the protest is based
- State the proposed changes to the RFP provisions or other relief sought
- Protests to the RFP must be received by the due date and time identified in the Schedule
- Protests to Addenda must be received by the due date identified in the respective Addendum

3.3.4.4 Protest Response

Agency will respond timely to all protests submitted by the due date and time listed in the Schedule. Protests that are not received timely or do not include the required information may not be considered.

3.3.5 Proposal Submission Options

Proposer is solely responsible for ensuring its Proposal is received by the SPC in accordance with the RFP requirements before Closing. Agency is not responsible for any delays in mail or by common carriers or by transmission errors or delays or mistaken delivery. Proposal submitted by any means not authorized will be rejected.

3.3.5.1 Submission through ORPIN

Proposal may be submitted electronically through ORPIN. Supplier eBidding Instructions – User Guide can be found at:
<http://www.oregon.gov/DAS/EGS/ps/Pages/eBidding.aspx>

3.3.5.2 Submission through Mail or Parcel Carrier

Proposal may be submitted through the mail or via parcel carrier, and must be clearly labeled and submitted in a sealed envelope, package or box. The outside of the sealed submission must clearly identify the Proposer's name and the RFP number. It must be sent to the attention of the SPC at the address listed on the Cover Page.

3.3.5.3 Submission in Person

Proposal may be hand delivered, and must be clearly labeled and submitted in a sealed envelope, package or box. Proposal will be accepted, prior to Closing, during Agency's normal Monday –Friday business hours of 8:00 am to 5:00 pm Pacific Time, except during State of Oregon holidays and other times when Agency is closed. The outside of the sealed submission must clearly identify the Proposer's name and the RFP number. It must be delivered to the attention of the SPC at the address listed on the Cover Page.

3.3.6 Proposal Modification or Withdrawal

Any Proposer who wishes to make modifications to a Proposal already received by Agency shall submit its modification in one of the manners listed in the Proposal Submission Options section and must denote the specific change(s) to the Proposal submission.

If a Proposer wishes to withdraw a submitted Proposal, it shall do so prior to Closing. The Proposer shall submit a Written notice Signed by an authorized representative of its intent to withdraw its Proposal in accordance with OAR 125-247-0440. The notice must include the RFP number and be submitted to the SPC.

3.3.7 Proposal Due

Proposal and all required submittal items must be received by the SPC on or before Closing. Proposal received after the Closing will not be accepted. All Proposal modifications or withdrawals must be completed prior to Closing.

Proposals received after Closing are considered LATE and will NOT be accepted for evaluation. Late Proposals will be returned to the respective Proposer or destroyed.

3.3.8 Proposal Rejection

Agency may reject a Proposal for any of the following reasons:

- Proposer fails to substantially comply with all prescribed RFP procedures and requirements, including but not limited to the requirement that Proposer's authorized representative sign the Proposal in ink.
- Proposer fails to meet the responsibility requirements of ORS 279B.110.
- Proposer makes any contact regarding this RFP with State representatives such as State employees or officials other than the SPC or those the SPC authorizes, or inappropriate contact with the SPC.
- Proposer attempts to inappropriately influence a member of the Evaluation Committee.
- Proposal is conditioned on Agency's acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP or Addenda.

3.3.9 Opening of Proposal

There will be no public Opening of Proposals. Proposals received will not be available for inspection until after the evaluation process has been completed and the Notice of Intent to Award is issued pursuant to OAR 125-247-0630. However, Agency will record and make available the identity of all Proposers after Opening.

3.4 ROUND 1 PROPOSAL CONTENT REQUIREMENTS

Proposal must address each of the items listed in this section and all other requirements set forth in this RFP. Proposer shall describe the Goods to be provided or the Services to be performed or both. A Proposal that merely offers to provide the Goods or Services as stated in this RFP will be considered non-Responsive to this RFP and will not be considered further.

Do not include marketing or advertising material in the Proposal. Proposals should be straightforward and address the requests of the RFP. Proposals containing excess marketing or advertising material may receive a lower evaluation score if specific information is difficult to locate.

3.4.1 Proposal Certification Sheet

The Proposer shall complete and submit the Proposal Certification Sheet (Attachment C).

3.4.2 Proposer Information Sheet

The Proposer shall complete and submit the Proposer Information Sheet (Attachment D). Attachment D must be submitted as an MS Excel file. Letters of authorization for Tier 1 manufacturers listed in Attachment D must be submitted as Attachment D-1.

3.4.3 Tax Affidavit

The Proposer shall complete and submit the Tax Affidavit (Attachment E).

Failure to demonstrate compliance with Oregon Tax Laws may result in a finding of non-responsibility.

3.4.4 Company Experience

Describe Proposer’s IT value added reseller experience. Describe how it meets or exceeds all aspects of the minimum Proposer requirements:

- CAPABILITY - Describe Proposer’s capability to be Oregon’s IT HVAR.
- AUTHORIZED - Describe how Proposer will maintain business relationships with a broad spectrum of manufacturers, and how it will establish new relationships over time as technology evolves.
- EXPERIENCE - Describe Proposer’s experience as a large-scale IT value added reseller. Include large customers and how being their IT value added reseller prepared you to be Oregon’s best selection for its IT HVAR.

3.4.5 Team Experience / Team Structure (Key Persons and their Resumes)

3.4.5.1 Contract Manager

Propose the person who will be assigned to manage the Price Agreement. This person will be the primary point of contract for the Price Agreement Administrator for the duration of the Price Agreement.

- Describe why this person is being proposed to be the IT HVAR Contract Manager
- Include a current resume

3.4.5.2 Account Manager

Propose the person who will be assigned to lead the account team that serves the needs of the APs (this may or may not be the same person as the Contract Manager).

- Describe why this person is being proposed to be the IT HVAR Account Manager
- Include a current resume (if a different person than above)

3.4.5.3 Account Team

Describe the structure of the account team that will serve the needs of the APs. It is critical that the process for an AP to receive help is simple. There may be a single point of contact for the entire State or a team that manages different areas.

- Describe why the team is structured this way and why this structure is the best fit for Oregon
- Specifying the members of the account team and providing their resumes is optional

3.4.6 References

Provide 3 references from current or former client firms for similar projects performed for any clients within the last 5 years. References must verify the quality of previous, related Work.

Agency may check to determine if references provided support Proposer's ability to comply with the requirements of this RFP. Agency may use references to obtain additional information, break tie scores, or verify any information needed. Agency may contact any reference (submitted or not) to verify Proposer's qualifications.

Proposer shall send the Reference Check Form (Attachment F) to its references. Reference forms must be completed by the reference, returned to the Proposer and submitted with the Proposal.

3.4.7 Manufacturer Neutrality

Describe how the IT HVAR will maintain manufacturer neutrality. How will the AP know that the IT HVAR will represent all manufacturers equally? How will the AP know that the options presented are in the AP's best interest and not skewed in favor of the bottom line of the IT HVAR?

3.4.8 Public Record/Confidential or Proprietary Information

All Proposals are public record and are subject to public inspection after Agency issues the Notice of the Intent to Award. If a Proposer believes that any portion of its Proposal contains any information that is a trade secret under ORS Chapter 192.501(2) or otherwise is exempt from disclosure under the Oregon Public Records Law (ORS 192.410 through 192.505), Proposer shall complete and submit the Affidavit of Trade Secret (Attachment B) and a fully redacted version of its Proposal.

Proposer is cautioned that cost information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.410 through 192.505) and identifying the Proposal, in whole, as exempt from disclosure is not acceptable. Agency advises each Proposer to consult with its own legal counsel regarding disclosure issues.

If Proposer fails to identify the portions of the Proposal that Proposer claims are exempt from disclosure, Proposer has waived any future claim of non-disclosure of that information.

3.5 ROUND 1 EVALUATION PROCESS

3.5.1 Responsiveness and Responsibility Determination

Proposals received prior to Closing will be reviewed for Responsiveness to all RFP requirements including compliance with Minimum Requirements section and Proposal Content Requirements section. If the Proposal is unclear, the SPC may request clarification from Proposer. However, clarifications may not be used to rehabilitate a non-Responsive Proposal. If the SPC finds the Proposal non-Responsive, the Proposal may be rejected, however, Agency may waive mistakes in accordance with OAR 125-247-0470.

In accordance with OAR 137-047-0261(6)(a)(A), Agency may establish a Competitive Range of all Proposers who have made a good faith effort in submitting a Proposal in response to

this RFP for the purpose of correcting deficiencies in Proposals for determining responsiveness during Round 1.

At any time prior to award, Agency may reject a Proposer found to be not Responsible.

Proposals meeting the requirements outlined in the Proposal Content Requirements section will move into Round 1 evaluation.

3.5.2 Mathematic Calculated Scoring

Data submitted in section D6 and D7 of Attachment D will be used for scoring this section. Each item in this section will receive a score calculated out of a maximum score of 10 as detailed in each subsection below:

3.5.2.1 Manufacturer Representation

Scores will be assigned to each Proposal based on each “YES” indicated. Scores are as indicated below.

	Score
Tier 1	0.250
Tier 2	0.120
Tier 3	0.041

3.5.2.2 Average Order Fulfilment Time

Scores will be assigned to each Proposal based on its Average Order Fulfilment Time as it compares to the other Proposals. This is the time from the order being received until the order ships complete. This will be a calculation using a formula comparing all Proposers’ times using the following formula:

$$\frac{\text{Lowest Average Order Fulfilment Time of all Proposals}}{\text{Average Order Fulfilment Time being scored}} \times 10 = \text{Score received}$$

3.5.2.3 Order Accuracy Rate

Points will be assigned to each Proposal based on its Order Accuracy Rate as it compares to the other Proposals. Points will be assigned to each Proposal based on their Order Accuracy Rate as it compares to the following table:

Order Accuracy Rate	Score
>99.90%	10
99.80% - 99.89%	9
99.70% - 99.79%	8
99.60% - 99.69%	7
99.50% - 99.59%	6
99.40% - 99.49%	5
99.20% - 99.39%	4
99.00% - 99.19%	3
98.50% - 98.99%	2
98.00% - 98.49%	1
< 97.99%	0

3.5.3 References

All reference questions are scored by the reference on a scale of 0 to 10. All reference question scores from all submitted reference forms will be averaged to determine the reference score.

3.5.4 Evaluation Criteria

The remaining Round 1 submission material will be evaluated by an Evaluation Committee. Evaluators will assign a score of 0 to 10 for each evaluation criterion listed below in this section.

SPC may request further clarification to assist the Evaluation Committee in gaining additional understanding of Proposals. A response to a clarification request must be to clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

SCORE	EXPLANATION
10	OUTSTANDING - Response meets all the requirements and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the subject matter and project. The Proposer provides insight into its expertise, knowledge, and understanding of the subject matter.
6 – 9	VERY GOOD – Response provides useful information, while showing experience and knowledge within the category. Response demonstrates above average knowledge and ability with no apparent deficiencies noted.
5	ADEQUATE – Response meets all requirements in an adequate manner. Response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by the Proposer.
1 – 4	FAIR – Proposer meets minimum requirements, but does not demonstrate sufficient knowledge of the subject matter.
0	RESPONSE OF NO VALUE – An unacceptable response that does not meet the requirements set forth in the RFP. Proposer has not demonstrated knowledge of the subject matter.

3.5.4.1 Company Experience

- How well does Proposer’s experience demonstrate its capability to be the IT HVAR?
- How well does Proposer describe its plans and methods for maintaining business relationships with a broad spectrum of manufacturers and how it will establish new relationships as time moves forward, to ensure that it is able to provide access to the products that Oregon needs as technology evolves?
- How well does Proposer’s experience being a large scale IT HVAR and experience with large customers prepare Proposer to be the IT HVAR?

3.5.4.2 Contract Manager Experience

- How valuable will the proposed Contract Manager be?

- How well does this person’s experience demonstrate his/her ability to manage a contract of this scale?

3.5.4.3 Account Manager Experience

- How valuable will the proposed Account Manager be?
- How well does this person’s experience demonstrate his/her ability to manage an account of this scale?

3.5.4.4 Account Team Structure

- How well does the proposed team structure fit the APs’ needs?
- How well will Proposer be able to meet the diverse needs of APs throughout the state with the proposed structure?

3.5.4.5 Manufacturer Neutrality

- How well does Proposer demonstrate its commitment to maintaining manufacturer neutrality?
- How well does Proposer demonstrate its ability to represent all manufacturers equally without giving any preferences?

3.6 ROUND 1 NEXT STEP DETERMINATION

Agency may determine Apparent Successful Proposer at the conclusion of Round 1 evaluation, or Agency may conduct additional rounds of competition if in the best interest of the State. Additional rounds of competition may consist of, but will not be limited to:

- Establishing a Competitive Range
- Presentations/Demonstrations/Additional Submittal Items
- Interviews
- Best and Final Offers

3.7 ROUND 1 COMPETITIVE RANGE

3.7.1 Competitive Range Determination

Proposers with the 5 highest scoring Round 1 Proposals will advance to Round 2. Agency may increase or decrease the number of Proposers advancing to Round 2 if there is a natural break in the scores. Agency will post a notice in ORPIN of the Competitive Range Determination for Round 1, which includes the Proposers advancing to Round 2.

3.7.2 Competitive Range Protest

Proposers excluded from Round 2 may submit a Written protest of Competitive Range. Protests must:

- Be emailed to the SPC;
- Reference the RFP number;
- Identify Proposer’s name and contact information;

- Be sent by an authorized representative
- State the reason for the protest;
- Be received by the due date and time identified in the Notice of Competitive Range; and

Agency will address all protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by Agency.

3.8 ROUND 2 PROCUREMENT PROCESS

Round 2 consists of submitted Written proposals independently evaluated by Evaluation Committee members.

3.8.1 Public Notice

Any modifications to the Round 2 process, submission requirements, or any other changes will be published in ORPIN.

3.8.2 Questions / Requests for Clarification

All inquiries, relating to Round 2 must:

- Be emailed to the SPC
- Reference the RFP and round number
- Identify Proposer's name and contact information
- Be sent by an authorized representative
- Be submitted by a Proposer in the Competitive Range
- Refer to the specific area of the RFP being questioned (i.e. page, section and paragraph number); and
- Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule

3.8.3 Submission Options

Proposer is solely responsible for ensuring its Round 2 submission is received by the SPC in accordance with the RFP requirements before Round 2 Closing. Agency prefers email submission, but Proposer may submit Round 2 submissions by mail or parcel carrier or in person as set forth below, as well. Proposal submitted by any means not authorized will be rejected. Agency is not responsible for any error in proposal transmission, including delays in mail or by common carriers or by transmission errors or delays or mistaken delivery.

3.8.3.1 Submission via email

Round 2 submissions may be submitted via email directly to the SPC. The subject line of the email must contain the following:

- RFP and round number
- Proposer's name

3.8.3.2 Submission through Mail or Parcel Carrier

Submission may be submitted through the mail or via parcel carrier, and must be clearly labeled and submitted in a sealed envelope, package or box. The outside of the sealed submission must clearly identify the Proposer’s name and the RFP number. It must be sent to the attention of the SPC at the address listed on the Cover Page.

3.8.3.3 Submission in Person

Submission may be hand delivered, and must be clearly labeled and submitted in a sealed envelope, package or box. Round 2 submission will be accepted, prior to Closing, during Agency’s normal Monday –Friday business hours of 8:00 am to 5:00 pm Pacific Time, except during State of Oregon holidays and other times when Agency is closed. The outside of the sealed submission must clearly identify the Proposer’s name and the RFP number. It must be delivered to the attention of the SPC at the address listed on the Cover Page.

3.8.4 Submission Modification or Withdrawal

Any Proposer who wishes to make modifications to a Round 2 submission already received by Agency shall withdraw its already submitted Proposal and email a replacement Round 2 submission following the Round 2 submission requirements.

If a Proposer wishes to withdraw a submitted Round 2 submission, it shall do so prior to Round 2 Closing. The Proposer shall email a Written notice Signed by an authorized representative of its intent to withdraw its Round 2 submission in accordance with OAR 125-247-0440. The notice must include the RFP number and be submitted to the SPC.

3.8.5 Submission Due

Submission and all required submittal items must be received by the SPC on or before Round 2 Closing. Submission received after Round 2 Closing will not be accepted. All submissions modifications or withdrawals must be completed prior to Round 2 Closing.

Submissions received after Round 2 Closing are considered LATE and will NOT be accepted for evaluation. Late Submissions will be returned to the respective Proposer or destroyed.

3.8.6 Proposal Rejection

Agency may reject a Round 2 submission for any of the following reasons:

- Proposer fails to substantially comply with all Round 2 requirements.
- Proposer makes any contact regarding this RFP with State representatives such as State employees or officials other than the SPC or those the SPC authorizes, or inappropriate contact with the SPC.
- Proposer attempts to inappropriately influence a member of the Evaluation Committee.
- Proposal is conditioned on Agency’s acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP or Addenda.

3.8.7 Opening of Round 2 Submission

There will be no public Opening of Round 2 submissions. Round 2 submissions received will not be available for inspection until after the evaluation process has been completed and the Notice of Intent to Award is issued pursuant to OAR 125-247-0630. However, Agency will record and make available the identity of all Proposers after Opening.

3.9 ROUND 2 SUBMISSION CONTENT REQUIREMENTS

Round 2 submission must address each of the items listed in this section and all other requirements set forth in this RFP. Proposer shall describe the Goods to be provided or the Services to be performed or both. A Round 2 submission that merely offers to provide the Goods or Services as stated in this RFP will be considered non-Responsive to this RFP and will not be considered further.

Do not include marketing or advertising material in the Round 2 Submission. Round 2 Submissions should be straightforward and address the requests of the RFP. Round 2 Submissions containing excess marketing or advertising material may receive a lower evaluation score if specific information is difficult to locate.

3.9.1 Pricing and Payment Structure

3.9.1.1 Pricing Methodology

Describe the pricing methodology Proposer would like to use if offered an award. Include the following elements:

- How will the cost of each item be auditable to ensure cost compliance with the Price Agreement?
- How will this cost approach be in the best interest of Oregon?
- How will cost changes be managed and documented over the life of the Price Agreement?
- Will leasing be offered, and if so, how will it be managed?

3.9.1.2 Discount Terms

Describe any early payment discount terms Proposer will provide if offered an award.

3.9.1.3 Other Hard Cost Savings

Describe any other cost-related or saving-related measures Proposer will provide if offered an award.

3.9.2 Order Fulfilment and Product Returns

3.9.2.1 Order Fulfilment Process

Describe proposed order fulfilment process. Be sure to include the following elements:

- Options for AP to determine product choices
- Options for AP to place orders

- Process between receiving and shipping the order
- Sourcing products
- Warehousing

3.9.2.2 Shipping Process

Describe the various options for how products are delivered to the AP. Explain what options are offered at no charge, and what options are offered at a charge. Describe how the charged options are calculated, but do not include actual costs in this section.

3.9.2.3 Product Return Process

Describe the proposed product return process in the following situations:

- **Scenario 1:** Product was ordered. The order was filled and shipped correctly. After the order was accepted, AP discovered it ordered the wrong product and wants to return the product.
- **Scenario 2:** Product was ordered. The order was filled and shipped. After the order was accepted, AP discovered the product delivered did not match the product that was ordered. AP would like to return the product.

3.9.3 Company Strengths

3.9.3.1 Uniqueness

Describe at least one significant thing Proposer offers it believes is not offered by its major competitors. What sets Proposer apart from the competition?

3.9.3.2 Excellence

Describe at least one significant thing that Proposer does better than its major competitors. What sets Proposer apart from the competition?

3.9.3.3 Improvement

Describe at least one significant thing upon which Proposer needs to improve. Where does Proposer not perform satisfactorily? What is Proposer doing to improve this/these shortcomings?

3.9.4 Problem Resolution

3.9.4.1 Scenario 1:

Describe at least one recent situation where Proposer made a major error that resulted in dire consequences for a customer. Detail the error and what changes Proposer has made to avoid repeating the error in the future. In this situation, the problem is not solved in time to take care of the customer, and the customer is likely lost.

3.9.4.2 Scenario 2:

Describe at least one recent situation where Proposer made a major error that had potential dire consequences for a customer. Detail the error and what was done to

correct the situation. To what lengths did Proposer go to take care of the customer? What changes (if any) did Proposer make to avoid repeating the error in the future? In this situation, the problem is solved in time to take care of the customer, and the customer is likely not lost.

3.9.5 IT HVAR Program

3.9.5.1 Implementation

Describe Proposer’s plan of how to set up the IT HVAR program. Oregon currently has several contracts directly with IT hardware manufacturers but no IT HVAR program. Include the steps Proposer would take to transition Oregon from a manufacturer-direct model to an IT HVAR program.

3.9.5.2 Maintenance/Improvement

Describe Proposer’s plan of how to maintain and improve the IT HVAR program over time. Include strategies for making adjustments to strengthen what is working well and to modify what is not working well.

3.9.5.3 Promotion

Describe Proposer’s plan of how to promote and market the IT HVAR program to APs. Consider things such as:

- Regularly scheduled event to promote the IT HVAR program that showcases the various brands available under the Price Agreement
- Technology roadmap events informing AP’s of technology trends

3.9.5.4 Reporting

Describe Proposer’s reporting capability, including:

- Standard reporting
- Custom reporting
- Ad hoc reporting

3.9.5.5 Other

Provide any further information regarding the IT HVAR program that does not fit into the other subsections.

3.9.6 Additional Program Commitment

3.9.6.1 Socioeconomic Program Support

It is very important to Oregon to support its local businesses and various socioeconomic programs including but not limited to the Office of Minority, Women and Emerging Small Business (OMWESB) registered and disabled veteran-owned businesses.

- Describe how Proposer will support these programs and business if selected as Oregon’s IT HVAR.

- Describe how Proposer will document and report this support to Agency during the duration of the Price Agreement.

3.9.6.2 Environmental Commitment

Describe Proposer’s environmental commitment. What programs and practices does Proposer have in place to support the environment?

3.9.7 Contract Management Services

Contract Management Services are the services the IT HVAR will provide to Agency and APs at no charge. Proposer shall complete and submit Attachment I to list and describe the services it will deliver if selected as the IT HVAR.

3.9.8 Public Record/Confidential or Proprietary Information

All Proposals are public record and are subject to public inspection after Agency issues the Notice of the Intent to Award. If a Proposer believes that any portion of its Proposal contains any information that is a trade secret under ORS Chapter 192.501(2) or otherwise is exempt from disclosure under the Oregon Public Records Law (ORS 192.410 through 192.505), Proposer shall complete and submit the Affidavit of Trade Secret (Attachment B) and a fully redacted version of its Proposal.

Proposer is cautioned that cost information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.410 through 192.505) and identifying the Proposal, in whole, as exempt from disclosure is not acceptable. Agency advises each Proposer to consult with its own legal counsel regarding disclosure issues.

If Proposer fails to identify the portions of the Proposal that Proposer claims are exempt from disclosure, Proposer has waived any future claim of non-disclosure of that information.

3.10 ROUND 2 EVALUATION PROCESS

3.10.1 Responsiveness Determination

Proposals received prior to Round 2 Closing will be reviewed for completeness and compliance with Round 2 submission Content Requirements section. If the Proposal is unclear, Proposer may be asked to provide clarification. Proposals meeting all requirements will be evaluated by an Evaluation Committee as described below:

3.10.2 Evaluation Criteria

Proposals meeting the requirements of the Round 2 submission Content Requirements section will be evaluated by a committee. Evaluators will assign a score of 0 to 10 for each evaluation criterion listed below in this section.

Agency may request clarification to gain understanding of Proposals. A response to a clarification must be to clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

SCORE	EXPLANATION
10	OUTSTANDING - Response meets all the requirements and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the

	subject matter and project. The Proposer provides insight into its expertise, knowledge, and understanding of the subject matter.
6 – 9	VERY GOOD – Response provides useful information, while showing experience and knowledge within the category. Response demonstrates above average knowledge and ability with no apparent deficiencies noted.
5	ADEQUATE – Response meets all requirements in an adequate manner. Response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by the Proposer.
1 – 4	FAIR – Proposer meets minimum requirements, but does not demonstrate sufficient knowledge of the subject matter.
0	RESPONSE OF NO VALUE – An unacceptable response that does not meet the requirements set forth in the RFP. Proposer has not demonstrated knowledge of the subject matter.

3.10.2.1 Pricing and Payment Structure

3.10.2.1.1 Pricing Methodology

- How well does the pricing methodology ensure the State will get the best value through the duration of the Price Agreement?
- How well does the pricing methodology fit the AP’s needs?

3.10.2.1.2 Discount Terms

- How valuable are the potential savings from the discount terms?

3.10.2.1.3 Other Hard Cost Savings

- How valuable are the other hard cost savings?
- How likely are the savings going to be realized?

3.10.2.2 Order Fulfilment and Product Returns

3.10.2.2.1 Order Fulfilment Process

- How well does the product selection method meet the AP’s needs?
- How well do the order placement options meet the AP’s needs?
- How well does the order fulfilment process (full process from how they source their products through how they prepare their products to be delivered to the AP) demonstrate Proposer’s ability to fulfil AP’s needs?

3.10.2.2.2 Shipping Process

- How well do the shipping options meet the AP’s needs?
- How well do the shipping options bring value to the State?

3.10.2.2.3 Product Return Process Scenario 1

- How well does the return process meet the AP's needs?

3.10.2.2.4 Product Return Process Scenario 2

- How well does the return process meet the AP's needs?

3.10.2.3 Company Strengths

3.10.2.3.1 Uniqueness

- How well do Proposer's unique attributes bring value to the State?
- How well do these attributes meet needs that have not been met in the past?

3.10.2.3.2 Excellence

- How valuable are Proposer's areas of excellence to the State?
- How well do these areas meet needs that are not currently being met?

3.10.2.3.3 Improvement

- How well does Proposer's improvement description demonstrate its ability to assess its own self-awareness and need for improvement?
- How valuable is this to the State?

3.10.2.4 Problem Resolution

3.10.2.4.1 Scenario 1

- How well does the explanation describe Proposer's ability to assess its own practices and implement needed changes to better meet customer needs?
- How well does the explanation demonstrate Proposer's commitment to its customers?
- How confident would you be in Proposer being your IT HVAR?

3.10.2.4.2 Scenario 2

- How well does the explanation describe the lengths to which Proposer will go to take care of its customers?
- How well does the explanation describe Proposer's ability to assess its own practices and implement needed changes to better meet customer needs?
- How well does the explanation demonstrate Proposer's commitment to its customers?
- How confident would you be in Proposer being your IT HVAR?

3.10.2.5 IT HVAR Program

3.10.2.5.1 Implementation

- How well does Proposer understand what is required to set up a statewide IT HVAR program?
- How well does Proposer describe its ability to implement a successful IT HVAR program for Oregon?

3.10.2.5.2 Maintenance/Improvement

- How well does Proposer understand how to maintain a statewide IT HVAR program, keeping current as technology evolves and manufacturers change?
- How well does Proposer demonstrate its ability to listen, understand, assess changing needs, and make improvements to keep an IT HVAR program improving over time?

3.10.2.5.3 Promotion

- How well do Proposer’s plans for IT HVAR program promotion meet Oregon’s needs?
- How well do Proposer’s plans bring value to Oregon?

3.10.2.5.4 Reporting

- How well does Proposer’s reporting capability meet Oregon’s needs?

3.10.2.5.5 Other

- How well has Proposer brought forth other ideas that make it a great candidate to be Oregon’s IT HVAR?

3.10.2.6 Additional Program Commitment

3.10.2.6.1 Socioeconomic Program Support

- How well will Proposer support OMWESB-registered firms if selected as the IT HVAR?
- How well will Proposer support disabled veteran-owned firms if selected as the IT HVAR?
- How well will Proposer support local Oregon business if selected as the IT HVAR?
- How well will Proposer otherwise support Oregon and other socioeconomic programs?
- How well does the documentation and reporting enable Agency to demonstrate how the IT HVAR supports Oregon’s socioeconomic programs?

3.10.2.6.2 Environmental Commitment

- How well does Proposer take care of the environment?
- How well do Proposer’s environmental practices demonstrate a commitment to the environment?

3.10.2.7 Contract Management Services

- How valuable are the proposed contract management services?
- How well do the contract management services meet the needs of the AP’s?

3.11 ROUND 2 NEXT STEP DETERMINATION

Agency may determine Apparent Successful Proposer at the conclusion of Round 2 evaluation, or Agency may conduct additional rounds of evaluation if in the best interest of the State. Additional rounds of evaluation may consist of, but will not be limited to:

- Establishing a Competitive Range
- Presentations/Demonstrations/Additional Submittal Items
- Interviews
- Best and Final Offer

3.12 ROUND 2 COMPETITIVE RANGE

3.12.1 Competitive Range Determination

Proposers with the 3 highest scoring Round 2 submissions will advance to Round 3. Agency may increase or decrease the number of Proposers advancing to Round 3 if there is a natural break in the scores. Agency will post a notice in ORPIN of the Competitive Range Determination for Round 2, which includes the Proposers advancing to Round 3.

3.12.2 Competitive Range Protest

Proposers excluded from Round 3 may submit a Written protest of Competitive Range. Protests must:

- Be emailed to the SPC;
 - Reference the RFP number;
 - Identify Proposer’s name and contact information;
 - Be sent by an authorized representative
 - State the reason for the protest;
 - Be received by the due date and time identified in the Notice of Competitive Range;
- and

Agency will address all protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by Agency.

3.13 ROUND 3 PROCUREMENT PROCESS

Round 3 consists of three components:

- Demonstration of website to be independently evaluated by Evaluation Committee members.
- Hands-on evaluation of website independently evaluated by Evaluation Committee members.
- Submitted Written Cost Proposal evaluated mathematically.

3.13.1 Website Demonstration Scheduling

Proposers progressing to Round 3 will be invited to provide demonstrations of their websites for the purpose of hands-on evaluation. Time slots will be determined by the rank order based on the points entering Round 3. Proposer must have at least one member on-site to conduct the demonstration; others may participate via teleconference.

Demonstrations will take place on the dates listed in the Schedule in a computer lab. The computer lab consists of one presenter computer with a projector and smart board and 16 participant computers. Additional demonstration guidance will be provided prior to the demonstrations.

Demonstrations will be held at:

State of Oregon - Department of Administrative Services
Mt. Hood Conference Room (computer lab)
1225 Ferry Street SE
Salem, OR 97301

3.13.2 Website Demonstration

During the demonstration of the website, cover at least the following elements:

3.13.2.1 Capability

Demonstrate the capabilities of the site.

3.13.2.2 Functionality

Demonstrate the features and functions of the site. How are items covered by the price agreement separated from items not covered by the price agreement? How are excluded items managed?

3.13.2.3 Usability

Demonstrate the intuitiveness of the site. Demonstrate the ease of use for the infrequent user. How complicated is it for the AP to find what they need?

3.13.2.4 Reporting

Demonstrate what reporting capabilities are available in the site. Demonstrate the ad hoc reporting capabilities of the site.

3.14 ROUND 3 EVALUATION PROCESS

3.14.1 Evaluation Criteria

Websites demonstrated in Round 3 will be evaluated by a committee. Evaluators will assign a score of 0 to 10 for each evaluation criterion listed below in this section.

SCORE	EXPLANATION
10	OUTSTANDING - Response meets all the requirements and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the subject matter and project. The Proposer provides insight into its expertise, knowledge, and understanding of the subject matter.
6 – 9	VERY GOOD – Response provides useful information, while showing experience and knowledge within the category. Response demonstrates above average knowledge and ability with no apparent deficiencies noted.
5	ADEQUATE – Response meets all requirements in an adequate manner. Response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by the Proposer.
1 – 4	FAIR – Proposer meets minimum requirements, but does not demonstrate sufficient knowledge of the subject matter.
0	RESPONSE OF NO VALUE – An unacceptable response that does not meet the requirements set forth in the RFP. Proposer has not demonstrated knowledge of the subject matter.

3.14.1.1 Website

3.14.1.1.1 Capability

- How well do the capabilities of Proposer’s site meet the needs of Oregon?
- How well do the capabilities of Proposers site meet the needs of AP?
- How flexible is Proposer’s site?

3.14.1.1.2 Functionality

- How well do the functionalities of Proposer’s site meet the needs of Oregon?
- How well does Proposer’s site separate items that are and are not covered under the Price Agreement?
- How well does Proposer’s site block excluded items?

3.14.1.1.3 Usability

- How usable is Proposer’s site?
- How intuitive is Proposer’s site?

3.14.1.1.4 Reporting

- How useful is the reporting capability?

- How well do the reporting capabilities meet Oregon’s needs?
- How well do the reporting capabilities meet AP’s needs?

3.15 ROUND 3 SUBMISSION PROCESS

3.15.1 Public Notice

Details of the Round 3 submission requirements, and any other changes will be published in ORPIN.

3.15.2 Questions / Requests for Clarification

All inquiries relating to Round 3 must:

- Be emailed to the SPC
- Reference the RFP and round number
- Identify Proposer’s name and contact information
- Be sent by an authorized representative
- Be submitted by a Proposer in the Competitive Range
- Refer to the specific area of the RFP being questioned (i.e. page, section and paragraph number); and
- Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule

3.15.3 Submission Options

Proposer is solely responsible for ensuring its Round 3 submission is received by the SPC in accordance with the RFP requirements before Round 3 Closing. Agency prefers email submission, but Proposer may submit Round 3 submissions by mail or parcel carrier or in person as set forth below, as well. Proposal submitted by any means not authorized will be rejected. Agency is not responsible for any error in proposal transmission, including delays in mail or by common carriers or by transmission errors or delays or mistaken delivery.

3.15.3.1 Submission via email

Round 3 submissions may be submitted via email directly to the SPC. The subject line of the email must contain the following:

- RFP and round number
- Proposer’s name

3.15.3.2 Submission through Mail or Parcel Carrier

Submission may be submitted through the mail or via parcel carrier, and must be clearly labeled and submitted in a sealed envelope, package or box. The outside of the sealed submission must clearly identify the Proposer’s name and the RFP number. It must be sent to the attention of the SPC at the address listed on the Cover Page.

3.15.3.3 Submission in Person

Submission may be hand delivered, and must be clearly labeled and submitted in a sealed envelope, package or box. Round 3 submission will be accepted, prior to Closing, during Agency’s normal Monday –Friday business hours of 8:00 am to 5:00 pm Pacific Time, except during State of Oregon holidays and other times when Agency is closed. The outside of the sealed submission must clearly identify the Proposer’s name and the RFP number. It must be delivered to the attention of the SPC at the address listed on the Cover Page.

3.15.4 Submission Modification or Withdrawal

Any Proposer who wishes to make modifications to a Round 3 submission already received by Agency shall withdraw its already submitted Proposal and email a replacement Round 3 submission following the Round 3 submission requirements.

If a Proposer wishes to withdraw a submitted Round 3 submission, it shall do so prior to Round 3 Closing. The Proposer shall email a Written notice Signed by an authorized representative of its intent to withdraw its Round 3 submission in accordance with OAR 135-347-0440. The notice must include the RFP number and be submitted to the SPC.

3.15.5 Submission Due

Submission and all required submittal items must be received by the SPC on or before Round 3 Closing. Submission received after Round 3 Closing will not be accepted. All submissions modifications or withdrawals must be completed prior to Round 3 Closing.

Submissions received after Round 3 Closing are considered LATE and will NOT be accepted for evaluation. Late Submissions will be returned to the respective Proposer or destroyed.

3.15.6 Proposal Rejection

Agency may reject a Round 3 submission for any of the following reasons:

- Proposer fails to substantially comply with all Round 3 requirements.
- Proposer makes any contact regarding this RFP with State representatives such as State employees or officials other than the SPC or those the SPC authorizes, or inappropriate contact with the SPC.
- Proposer attempts to inappropriately influence a member of the Evaluation Committee.
- Proposal is conditioned on Agency’s acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP or Addenda.

3.15.7 Opening of Round 3 Submission

There will be no public Opening of Round 3 submission. Round 3 submission received will not be available for inspection until after the evaluation process has been completed and the Notice of Intent to Award is issued pursuant to OAR 125-247-0630. However, Agency will record and make available the identity of all Proposers after Opening.

3.16 ROUND 3 SUBMISSION CONTENT REQUIREMENTS

Round 3 submission will be the Cost Proposals. The Proposal content requirements and further instructions will be published as stated in the Schedule.

3.17 ROUND 3 NEXT STEP DETERMINATION

Agency may determine Apparent Successful Proposer at the conclusion of Round 3 evaluation, or Agency may conduct additional rounds of evaluation if in the best interest of the State. Additional rounds of evaluation may consist of, but will not be limited to:

- Establishing a Competitive Range
- Presentations/Demonstrations/Additional Submittal Items
- Interviews
- Best and Final Offer

3.18 COST EVALUATION

The SPC will conduct the cost evaluation. The SPC will award a cost score to each Cost Proposal based upon the percentage of the proposed cost as compared to the lowest Proposer’s cost using the following formula:

$$\frac{\text{lowest cost of all Proposers}}{\text{cost being scored}} \times \text{cost points possible} = \text{cost score}$$

3.19 PREFERENCES

3.19.1 Reciprocal Preference

For evaluation purposes per OAR 125-246-0310, Agency shall add a percent increase to each out-of-state Proposer's Proposal price that is equal to the percent preference, if any, given to a Resident Offeror of the [Proposer's state](#).

3.19.2 Recycled Materials

In comparing Goods from two or more Proposers, if at least one Proposer offers Goods manufactured with Recycled Materials, and at least 1 Proposer does not, Agency will select the Proposer offering Goods manufactured from Recycled Materials if each of the conditions specified in ORS 279A.125 (2) exists following any adjustments made to the price of the Goods according to any applicable reciprocal preference.

3.19.3 Tiebreakers

Oregon Supplies: If Agency receives Proposals identical in price, fitness, availability and quality and chooses to award a Price Agreement, Agency shall award the Price Agreement in accordance with the procedures outlined in OAR 125-246-0300.

3.20 POINT AND SCORE CALCULATIONS

Scores are the values (0 through 10) assigned by each evaluator.

Points are the total cumulative possible value for each Round and each section as listed in the table below.

The SPC will average all scores for each evaluation criterion. The average score will be used as a percentage multiplier of the maximum possible points for that criterion. 1=10%, 5=50%, 9=90%, etc.

Cost points are calculated as stated in the Cost Evaluation section.

Points possible are as follows:

rounds and categories		proposal §	evaluation §	max points possible	
Round 1	Product Offering	3.4.2	3.5.2	184	670
	Accuracy and Turnaround Time	3.4.2	3.5.2	170	
	Experience & Qualification	3.4.4-3.4.6	3.5.3-3.5.4	170	
	Manufacturer Neutrality	3.4.7	3.5.4	146	
Round 2	Pricing and Payment Structure	3.9.1	3.10.2.1	163	988
	Order Fulfilment and Product Returns	3.9.2	3.10.2.2	158	
	Company Strengths	3.9.3	3.10.2.3	125	
	Problem Resolution	3.9.4	3.10.2.4	158	
	IT HVAR Program	3.9.5	3.10.2.5	180	
	Extra-Program Commitment	3.9.6	3.10.2.6	108	
	Contract Management Services	3.9.7	3.10.2.7	96	
R3	Website	3.13.2	3.14.2.1	180	343
	Cost	3.16	3.18	163	

EXAMPLE:

Proposer A receives scores of 10, 9, and 8 for a criterion worth 50 points. The SPC averages 10, 9, and 8 for a score of 9. 9 is used as a 90% multiplier to the possible points of 50. 50 multiplied by 90% is 45. Proposer A’s points for the criterion is 45.

3.21 RANKING OF PROPOSERS

SPC will rank all Proposers advancing through all rounds of evaluation. The SPC will total the final average score (calculated by totaling the points awarded by each Evaluation Committee member and dividing by the number of members) from all rounds of competition, together with references, and final cost. After each applicable preference has been applied, SPC will determine rank order for each respective Proposal and Proposer, with the highest score receiving the highest rank, and successive rank order determined by the next highest score.

SECTION 4: AWARD AND NEGOTIATION

4.1 AWARD NOTIFICATION PROCESS

4.1.1 Award Consideration

Agency, if it awards a Price Agreement, shall award a Price Agreement to the highest ranking Responsible Proposer(s) based upon the scoring methodology and process described in

Section 3. Agency may award one or more Price Agreement or Price Agreement(s) for less than the full Scope defined in this RFP.

4.1.2 Intent to Award Notice

Agency will notify all Proposers in Writing that Agency intends to award a Price Agreement to the selected Proposer(s) subject to successful negotiation of any negotiable provisions.

4.2 INTENT TO AWARD PROTEST

4.2.1 Protest Submission

An Affected Proposer shall have 7 calendar days from the date of the intent to award notice to file a Written protest.

A Proposer is an Affected Proposer only if the Proposer would be eligible for Price Agreement award in the event the protest was successful and is protesting for one or more of the following reasons as specified in ORS 279B.410:

- All higher ranked Proposals are non-Responsive.
- Agency has failed to conduct an evaluation of Proposals in accordance with the criteria or process described in the RFP.
- Agency abused its discretion in rejecting the protestor's Proposal as non-Responsive
- Agency's evaluation of Proposals or determination of award otherwise violates ORS Chapter 279B or ORS Chapter 279A.

If Agency receives only one Proposal, Agency may dispense with the intent to award protest period and proceed with Price Agreement Negotiations and award.

4.2.1.1 Protests must:

- Be delivered to the SPC via email
- Reference the RFP number
- Identify prospective Proposer's name and contact information
- Be signed by an authorized representative
- Specify the grounds for the protest
- Be received within 7 calendar days of the intent to award notice

4.2.2 Response to Protest

Agency will address all timely submitted protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by Agency.

4.3 APPARENT SUCCESSFUL PROPOSER SUBMISSION REQUIREMENTS

4.3.1 Insurance

Prior to execution of the Price Agreement, the apparent successful Proposer shall secure and demonstrate to Agency proof of insurance coverage meeting the requirements identified in the RFP or as otherwise negotiated.

Failure to demonstrate coverage may result in Agency terminating Negotiations and commencing Negotiations with the next highest ranking Proposer. Proposer is encouraged to consult its insurance agent about the insurance requirements contained in Insurance Requirements (Exhibit D of Attachment A) prior to Proposal submission.

4.3.2 Taxpayer Identification Number

The apparent successful Proposer shall provide its Taxpayer Identification Number (TIN) and backup withholding status on a completed W-9 form if either of the following applies:

- When requested by Agency (normally in an intent to award notice), or
- When the backup withholding status or any other information of Proposer has changed since the last submitted W-9 form, if any.

Agency will not make any payment until Agency has a properly completed W-9.

4.3.3 Business Registry

If selected for award, Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Price Agreement. The selected Proposer shall submit a current Oregon Secretary of State business registry number, or an explanation if not applicable.

All Corporations and other business entities (domestic and foreign) must have a Registered Agent in Oregon. See requirements and exceptions regarding Registered Agents. For more information, see Oregon Business Guide, How to Start a Business in Oregon and Laws and Rules. The titles in this subsection are available at the following Internet site: <http://www.filinginoregon.com/index.htm>.

4.4 PRICE AGREEMENT NEGOTIATION

4.4.1 Negotiation

By submitting a Proposal, Proposer agrees to comply with the requirements of the RFP, including the terms and conditions of the Sample Price Agreement (Attachment A), with the exception of those terms reserved for negotiation. Proposer shall review the attached Sample Price Agreement and note exceptions. Unless Proposer notes exceptions in its Proposal, the State intends to enter into a Price Agreement with the successful Proposer substantially in the form set forth in Sample Price Agreement (Attachment A). It may be possible to negotiate some provisions of the final Price Agreement; however, many provisions cannot be changed. Proposer is cautioned that the State of Oregon believes modifications to the standard provisions constitute increased risk and increased cost to the State. Therefore, Agency will consider the Scope of requested exceptions in the evaluation of Proposals.

Any Proposal that is conditioned upon Agency's acceptance of any other terms and conditions may be rejected. Any subsequent negotiated changes are subject to prior approval of the Oregon Department of Justice.

All items, except those listed below, may be negotiated between Agency and the apparent successful Proposer in compliance with Oregon State laws:

- Choice of law

- Choice of venue
- Constitutional requirements

In the event that the parties have not reached mutually agreeable terms within 14 calendar days, Agency may terminate Negotiations and commence Negotiations with the next highest ranking Proposer.

SECTION 5: ADDITIONAL INFORMATION

5.1 OMWESB PARTICIPATION

Pursuant to Oregon Revised Statute (ORS) Chapter 200, and as a matter of commitment, Agency encourages the participation of minority, women, and emerging small business enterprises in all contracting opportunities. Agency also encourages joint ventures or subcontracting with minority, women, and emerging small business enterprises. For more information please visit <http://www.oregon.gov/gov/MWESB/Pages/index.aspx>

If the Price Agreement results in subcontracting opportunities, the successful Proposer may be required to submit a completed OMWESB Outreach Plan (Attachment H) prior to execution.

5.2 GOVERNING LAWS AND REGULATIONS

This RFP is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFP, evaluation and award is the Circuit Court of Marion County for the State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon.

5.3 OWNERSHIP/PERMISSION TO USE MATERIALS

All Proposals submitted in response to this RFP become the Property of Agency. By submitting an Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating an Agreement, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.410 through 192.505). Proposals, including supporting materials, will not be returned to Proposer unless the Proposal is submitted late.

5.4 CANCELLATION OF RFP; REJECTION OF PROPOSALS; NO DAMAGES.

Pursuant to ORS 279B.100, Agency may reject any or all Proposals in-whole or in-part, or may cancel this RFP at any time when the rejection or cancellation is in the best interest of the State or Agency, as determined by Agency. Neither the State nor Agency is liable to any Proposer for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFP, award, or rejection of any Proposal.

5.5 COST OF SUBMITTING A PROPOSAL

Proposer shall pay all the costs in submitting its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials, costs to participate in demonstrations, or costs associated with protests.

5.6 STATEWIDE E-WASTE/RECOVERY POLICY

If applicable, Proposer shall include information in its Proposal that demonstrates compliance with the Statewide [E-Waste/Recover Policy](#) effective July 1, 2012.

5.7 RECYCABLE PRODUCTS

Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the Services or Work set forth in this document and the subsequent Price Agreement. (ORS 279B.025)

SECTION 6: LIST OF ATTACHMENTS

ATTACHMENT A	SAMPLE PRICE AGREEMENT
ATTACHMENT B	AFFIDAVIT OF TRADE SECRET
ATTACHMENT C	PROPOSER CERTIFICATION SHEET
ATTACHMENT D	PROPOSER INFORMATION SHEET
ATTACHMENT E	TAX AFFIDAVIT
ATTACHMENT F	REFERENCE CHECK FORM
ATTACHMENT G	HISTORICAL DATA
ATTACHMENT H	OMWESB OUTREACH PLAN
ATTACHMENT I	CONTRACT MANAGEMENT SERVICES