**STATE OF MAINE**

**Department of Health and Human Services**

*Maine Center for Disease Control and Prevention*



**RFP# 202406117**

**Planning and Coordination for the**

**Statewide Infectious Disease Conference**

|  |  |
| --- | --- |
| **RFP Coordinator** | *All communication regarding the RFP must be made through the RFP Coordinator identified below*.  **Name:** Brittany Hall **Title:** Procurement Administrator  **Contact Information:** [Brittany.hall@maine.gov](mailto:Brittany.hall@maine.gov) |
| **Submitted Questions Due** | *All questions must be received by the RFP Coordinator identified above by:*  **Date:** July 1, 2024, no later than 11:59 p.m., local time |
| **Proposal Submission Deadline** | *Proposals must be received by the Division of Procurement Services by:*  **Submission Deadline:** July 29, 2024, no later than 11:59 p.m., local time.  *Proposals must be submitted electronically to*:[Proposals@maine.gov](mailto:Proposals@maine.gov) |

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PUBLIC NOTICE

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**State of Maine**

**Department of Health and Human Services**

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

The State of Maine is seeking proposals for the planning and coordination of a Statewide Infectious Disease Conference.

A copy of the RFP, as well as the Question & Answer Summary and all amendments related to the RFP, can be obtained at: <https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps>

Proposals must be submitted to the State of Maine Division of Procurement Services, via e-mail, at: [Proposals@maine.gov](mailto:Proposals@maine.gov). Proposal submissions must be received no later than 11:59 p.m., local time, on July 29, 2024. Proposals will be opened the following business day. Proposals not submitted to the Division of Procurement Services’ aforementioned e-mail address by the aforementioned deadline will not be considered for contract award.

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**RFP TERMS/ACRONYMS with DEFINITIONS**

The following terms and acronyms, as referenced in the RFP, shall have the meanings indicated below:

|  |  |
| --- | --- |
| **Term/Acronym** | **Definition** |
| **Continuing Education** | Professional development available at the Infectious Disease Conference where Participants may receive credit. |
| **Department** | Department of Health and Human Services |
| **Infectious Disease Conference** | A one-day Statewide conference and educational opportunity for approximately three to four hundred (300-400) Participants. |
| **Maine CDC** | Maine Center for Disease Control and Prevention |
| **Participant** | Individuals who attend the Statewide Infectious Disease Conference in May 2025. |
| **PCI-DSS Certification** | The global data security standard adopted by the payment card brands for all entities that process, store, or transmit cardholder data and/or sensitive authentication data. |
| **Planning Group** | Maine CDC’s Immunization Program staff. |
| **QR Code** | A machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone. |
| **RFP** | Request for Proposal |
| **State** | State of Maine |

**State of Maine - Department of Health and Human Services**

*Maine Center for Disease Control and Prevention*

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

**PART I INTRODUCTION**

1. **Purpose and Background**

The Department of Health and Human Services (Department) is seeking proposals to provide planning and coordination for the Statewide Infectious Disease Conference as defined in this Request for Proposal (RFP) document. This document provides instructions for submitting proposals, the procedure, and criteria by which the awarded Bidder will be selected, and the contractual terms which will govern the relationship between the State of Maine (State) and the awarded Bidder.

The Department is dedicated to promoting health, safety, resiliency, and opportunity to all Maine Residents. The Department’s Maine Center for Disease Control and Prevention provides leadership, expertise, information, and tools to assure conditions in which all Maine people can be healthy.

Since 1983, the Department has organized Statewide Infectious Disease Conferences targeting health issues of emerging concern. The Department continues to be committed to providing affordable and cost-effective educational opportunities for healthcare professionals and other interested parties throughout the State to maintain high standards of excellence in the provision of health services and public health initiatives. This Statewide Infectious Disease Conference will provide information on emerging science-based prevention, treatment, and adherence practices, in hopes of promoting more cost-effective care and life-enhancing health outcomes for the people of Maine.

As a result of this RFP, the awarded Bidder shall provide planning, coordination, and execution of an Infectious Disease Conference to be held May 2025, in Portland, Maine for approximately three to four hundred (300-400) participants. In addition, the awarded Bidder shall provide opportunities for Participants to receive Continuing Education credits as well as an evaluation of the conference sessions.

1. **General Provisions**
   1. From the time the RFP is issued until award notification is made, all contact with the State regarding the RFP must be made through the RFP Coordinator. No other person/ State employee is empowered to make binding statements regarding the RFP. Violation of this provision may lead to disqualification from the bidding process, at the State’s discretion.
   2. Issuance of the RFP does not commit the Department to issue an award or to pay expenses incurred by a Bidder in the preparation of a response to the RFP. This includes attendance at personal interviews or other meetings and software or system demonstrations, where applicable.
   3. All proposals must adhere to the instructions and format requirements outlined in the RFP and all written supplements and amendments (such as the Summary of Questions and Answers), issued by the Department. Proposals are to follow the format and respond to all questions and instructions specified below in the “Proposal Submission Requirements” section of the RFP.
   4. Bidders will take careful note that in evaluating a proposal submitted in response to the RFP, the Department will consider materials provided in the proposal, information obtained through interviews/presentations (if any), and internal Departmental information of previous contract history with the Bidder (if any). The Department also reserves the right to consider other reliable references and publicly available information in evaluating a Bidder’s experience and capabilities.
   5. The proposal must be signed by a person authorized to legally bind the Bidder and must contain a statement that the proposal and the pricing contained therein will remain valid and binding for a period of 180 days from the date and time of the bid opening.
   6. The RFP and the awarded Bidder’s proposal, including all appendices or attachments, will be the basis for the final contract, as determined by the Department.
   7. Following announcement of an award decision, all submissions in response to this RFP will be public records, available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA) ([1 M.R.S. § 401](http://www.mainelegislature.org/legis/statutes/1/title1sec401.html) et seq.).
   8. The Department, at its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to the RFP.
   9. All applicable laws, whether or not herein contained, are included by this reference. It is the Bidder’s responsibility to determine the applicability and requirements of any such laws and to abide by them.
2. **Contract Term**

The Department is seeking a cost-efficient proposal to provide services, as defined in the RFP, for the anticipated contract period defined in the table below. Please note, the dates below are estimated and may be adjusted, as necessary, in order to comply with all procedural requirements associated with the RFP and the contracting process. The actual contract start date will be established by a completed and approved contract.

The term of the anticipated contract, resulting from the RFP, is defined as follows:

|  |  |  |
| --- | --- | --- |
| **Period** | **Start Date** | **End Date** |
| Period of Performance | 9/1/2024 | 6/30/2025 |

1. **Number of Awards**

The Department anticipates making one (1) award as a result of the RFP process.

**PART II SCOPE OF SERVICES TO BE PROVIDED**

**Specific instructions for the Bidder to provide a narrative response to the Scope of Services may be found in Part IV, Section III, Services to be Provided.**

1. **Conference Pre-Planning Meetings**
   * 1. Schedule virtual planning meetings and ensure the Planning Group is notified at least ten (10) business days prior to the scheduled meeting date.
     2. Ensure planning timelines and other deadlines are communicated to the Planning Group in order to gain necessary information to meet the timelines and deadlines.
     3. Prepare and distribute planning meeting agendas to the Planning Group at least one (1) business day prior to the scheduled meeting.
     4. Prepare and distribute planning meeting minutes to attendees no later than five (5) business days after the meeting date.
        1. Minutes shall detail planning and implementation tasks, due dates, and persons responsible for completing individual tasks.
     5. Provide appropriate levels of administrative and support staff for all conference-related activities including planning meeting support, and to facilitate the development, delivery, and evaluation of individual conference goals and objectives.
     6. Collaborate with the Planning Group to identify target audience needs.
2. **Conference Advertising and Participant Support**
3. Advertise and promote the Statewide Infectious Disease Conference by:
   1. Designing, editing, producing, and printing “Save the Date” electronic and printed notices, announcements, brochures, and promotional materials.
   2. Disseminating “Save the Date” materials by initiating and facilitating timely distribution of requested postal mailings and through a variety of electronic-based distributions.
4. Ensure conference marketing and promotion includes:
   1. Electronic-based promotion with direct email conference notifications and downloadable brochures;
   2. Bulk and limited first-class mailings upon request; and
   3. Additional distribution of materials to select groups based on information provided by the Planning Group.
5. Initiate and facilitate mass mailings.
6. Provide pre-conference support to potential Participants by phone and e-mail.
7. **Infectious Disease Conference Website Requirements**
   * + 1. Design and maintain one (1) event website that provides an event agenda, list of conference speakers/presenters, learning objectives, available professional Continuing Education credits, printable brochures, ability to accept Participant registrations and requests for accommodations, and ability to receive and respond to direct Participants questions.
          1. Ensure the website includes a privacy statement.
          2. Ensure the website adheres to the State’s MaineIT Policies, specifically:

[Digital Accessibility Policy](https://www.maine.gov/oit/sites/maine.gov.oit/files/inline-files/DigitalAccessibilityPolicy.pdf);

[Social Media for State Business Policy](https://www.maine.gov/oit/sites/maine.gov.oit/files/inline-files/SocialMediaStateBusiness.pdf);

[Information Security Policy](https://www.maine.gov/oit/sites/maine.gov.oit/files/inline-files/SecurityPolicy.pdf), specifically:

1. 5.6 Backups; and
2. 5.26 Vulnerability Management.
   * + - 1. Obtain prior to the start of the initial period of performance, and maintain a PCI-DSS Certification.
         2. Ensure no data is released regarding the usage of the website without the written approval from the Department. This is regardless of whether the data would be given away, sold, bartered, or any through any other arrangement.
         3. Ensure any data collected, used, and reported on will be de- identified meeting the definition of TLP White as per MaineIT’s [Data Classification Policy](https://www.maine.gov/oit/sites/maine.gov.oit/files/inline-files/DataClassificationPolicy.pdf).
         4. Ensure the website does not include:

TikTok, which describes the social networking service TikTok or any successor application or service developed or provided by ByteDance Limited or an entity owned by ByteDance Limited.

* + - * 1. Provide the website link to the Department for approval, prior to the website going public.

1. **Conference Speakers/Presenters**
2. Identify, solicit, contract with (if necessary), and confirm conference speakers/presenters.
   1. Confirm all final speakers/presenters, including specific session information, and prepare for distribution at minimum, eight (8) weeks prior to the Infectious Disease Conference.
   2. Establish deadlines for submission of curriculum vitae, presentation needs, handouts, electronic presentations, and other event-related materials through direct contact with speakers/presenters.
3. Schedule/coordinate speakers/presenters travel (as appropriate).
4. Identify, confirm, and arrange travel as approved by the Planning Group and supported by the event budget.
5. **Conference Exhibits and Poster Displays**
6. Soliciting ten to twelve (10-12) exhibitor displays and poster presentations.
7. Negotiate, receive, process, and account for exhibitor event fees.
8. **Event Planning and Scheduling**
9. Schedule and organize all conference sessions, educational workshops, poster exhibits, exhibitor displays, and other on-site activities.
10. Ensure all event facilities meet the [Americans with Disabilities Act (ADA)](https://www.ada.gov/) specifications and are in compliance with applicable laws regarding [smoke-free environments](https://www.mainelegislature.org/legis/statutes/22/title22sec1542.html).
11. Supply and provide technical assistance for audiovisual equipment and other technology supplies and equipment used by conference and educational workshop speakers/presenters.
12. **Participant Registration**
13. Receive, process, and account for pre-conference and on-site Participant registrations.
14. Arrange accommodation requests by connecting directly with the Participant, ensuring their needs are fully met.
    1. Utilize the State’s Master Agreements for interpreting services.
15. Assist Participants with event registration, overnight accommodations, and transportation.
16. **Material Preparation and Distribution**
17. Create and utilize a QR Code scanning system, to be provided to Participants during the conference, which includes conference:
    1. Informational packets;
    2. Agendas;
    3. Speaker/presenter information;
    4. Session handouts;
    5. Evaluations; and
    6. Other related conference materials.
18. Communicate with the Planning Group and event speakers/presenters to obtain conference materials for the QR Code scanning system.
19. **Continuing Education Credits**
20. Apply for, obtain, and implement the delivery of professional Continuing Education credits.
    1. Confirm professional Continuing Education availability with the Planning Group.
    2. Advertise professional Continuing Education through promotional materials, the registration website, and Participant confirmation letters.
21. Advise the Planning Group of professional Continuing Education application timelines and deadlines and apply for and obtain professional Continuing Education credits as directed by the Planning Group.

1. **Educational Workshop Evaluations**
2. Develop, design, produce, and tabulate evaluations ensuring a written evaluation summary is made available for each conference session.
3. Develop conference evaluations utilizing feedback from the Planning Group and the types of professional Continuing Education offered.
4. Tabulate and provide the Planning Group and speakers/presenters with a compilation of evaluation results revealing the degree to which the event accomplished its stated learning objectives, satisfaction with the program format, speakers/presenters, handouts, facility, program support, and future learner needs through a combination of summarized numerical and narrative information.
5. Provide post event reporting to the professional entities providing the Continuing Education.
6. Invoice agencies that provided purchase orders for Registration, sponsorship/exhibitor booths.
7. Produce and mail pro-rated certificates of completion and Continuing Education credit to event Participants that did not participate in the entire Conference.
8. Produce a financial report accounting for all fee income and expenses for each event.
9. **General Conference Support**
10. Arrange and facilitate all audiovisual and information technology requests and manage supplies and equipment using, whenever possible, an array of audiovisual equipment to avoid incurring additional fees, and when necessary, manage contracting for these services.
11. Manage contracting for audiovisual taping of events, when requested by the Department.
12. Schedule and contract for conference space and serve as point of contact making all arrangements for site set-up, food, special accommodations, and audiovisual equipment.
13. Create and deliver event confirmation materials to Participants including – event information, professional Continuing Education availability, site directions, special accommodations verification, and pre-read or other event-related materials as designated by the Department.
14. Create and deliver event confirmation materials to speakers/presenters including – event information, site directions, travel arrangements, and title, time, and room location of individual session(s), audiovisual equipment identified for individual sessions(s), and any other pertinent information.
15. Create and deliver event confirmation materials to exhibitors and poster presenters including – event information, site directions, location, size, and electrical needs identified for each exhibitor booth/poster table.
16. Order awards and/or promotional materials as requested by the Department.
17. Produce signage, nametags, and information packets including agenda, evaluations, and handouts as directed.
    1. Post Department conference signage from all entry points directing Participants to the registration area.
18. Deliver all conference-related materials and supplies.
19. Provide a complete walk-through/presentation of the site including conference rooms, food, and exhibitor areas to ensure proper set-up, electrical needs, and other details have been met by the site.
20. Provide sufficient on-site support to smoothly manage the registration process, including collecting registration fees, providing receipts, name tags, information packets, Department promotional materials, and sign-in for professional Continuing Education credit as required by the approving entity.
21. Greet speakers/presenters and familiarize them with their presentation equipment; serve as a resource if technical difficulties emerge; collect speaker/presenter signatures on professional Continuing Education documentation of presentations as required by the approving entity.
22. Provide backup equipment for audiovisual equipment utilized during the event.
23. Welcome event exhibitors and poster presenters, provide signage to maximize their visibility and contribution to the conference, and direct them to exhibit space and/or assigned tables.
24. Upon completion of registration, provide an information table for Participants, planners, speakers/presenters, and exhibitors to receive prompt assistance.
25. Collect evaluations and professional Continuing Education documentation.
26. Accept requests for pro-rated attendance certificates and professional Continuing Education through an early departure sign-out process identifying the time a Participant left.
27. Produce and deliver certificates of completion and Continuing Education to event Participants.
28. Pack and remove from the conference site all equipment and unused conference related materials and supplies.
29. **Deliverables**
30. Ensure all key event planning dates outlined in Table 1 are delivered prior to or on the required due date.

|  |  |  |
| --- | --- | --- |
| **Table 1 – Key Event Planning Dates** | | |
| **Due Date** | | **Deliverable** |
|  | **12/15/2024** | Venue reservation confirmation |
|  | **1/15/2025** | Conference framework finalized |
|  | **2/1/2025** | List of potential exhibitors |
|  | **2/1/2025** | Early Bird registration opens |
|  | **2/28/2025** | Early Bird registration closes |
|  | **3/1/2025** | Exhibitor registration website completed |
|  | **3/1/2025** | Conference information and online registration is available on the conference website |
|  | **3/30/2025** | Promotional plan approved by Planning Group |
|  | **4/1/2025** | Speaker/presenter contracts and travel arrangements finalized |
|  | **4/15/2025** | Promotional materials distributed |
|  | **4/30/2025** | Session learning objectives finalized |
|  | **5/1/2025** | Conference agenda finalized |
|  | **5/1/2025** | Exhibitor registration and invoicing of exhibitor fees are complete |
|  | **5/1/2025** | Evaluation tool finalized |

# **Reports**

* 1. Track and record all data/information necessary to complete the required reports listed in **Table 2**:

|  |  |  |
| --- | --- | --- |
| **Table 2 – Required Reports** | | |
| **Name of Report** | | **Description** |
|  | Planning Group meeting minutes | Details specific planning and implementation activities including due dates and responsible staff. |
|  | Conference Evaluation Report | A written report summarizing the conference evaluations, including both numeric and narrative information. |
|  | Conference Summary | Includes conference location, date, # of registrants, # of Participants, Participant list, copies of brochures, agenda, information packets, evaluation sheets, Continuing Education availability, speakers/presenters, and exhibitors. |
|  | Conference financial summary | Financial report detailing income and expenses for the Conference. |

# Submit all the required reports to the Department in accordance with the timelines established in **Table 3**:

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 3 – Required Reports Timelines** | | | |
| **Name of Report** | | **Period Captured by Report** | **Due Date** |
|  | Planning Group meeting minutes | Point in time | To be distributed to all Planning Group Members within 7 days after each meeting |
|  | Conference Evaluation Report | Day of Conference | Thirty (30) calendar days after the conference |
|  | Conference Summary | Entire contract period | Thirty (30) calendar days after the conference |
|  | Conference financial summary | Entire contract period | Thirty (30) calendar days after the conference |

**PART III KEY RFP EVENTS**

1. **Questions**
   1. **General Instructions:** It is the responsibility of all Bidders and other interested parties to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions.
      1. Bidders and other interested parties should use **Appendix H** (Submitted Questions Form) for submission of questions. The form is to be submitted as a WORD document.
      2. The Submitted Questions Form must be submitted, by e-mail, and received by the RFP Coordinator, identified on the cover page of the RFP, as soon as possible but no later than the date and time specified on the RFP cover page.
      3. Submitted Questions must include the RFP Number and Title in the subject line of the e-mail. The Department assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt.
   2. **Question & Answer Summary:** Responses to all questions will be compiled in writing and posted on the following website no later than seven (7) calendar days prior to the proposal due date: [Division of Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain a copy of the Question & Answer Summary. Only those answers issued in writing on this website will be considered binding.
2. **Amendments**

All amendments released in regard to the RFP will also be posted on the following website: [Division of Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain amendments. Only those amendments posted on this website are considered binding.

1. **Submitting the Proposal**
   1. **Proposals Due:** Proposals must be received no later than 11:59 p.m. local time, on the date listed on the cover page of the RFP.
      1. Any e-mails containing original proposal submissions or any additional or revised proposal files, received after the 11:59 p.m. deadline, will be rejected without exception.
   2. **Delivery Instructions:** E-mail proposal submissions are to be submitted to the State of Maine Division of Procurement Services at [Proposals@maine.gov](mailto:Proposals@maine.gov).
      1. Only proposal submissions received by e-mail will be considered. The Department assumes no liability for assuring accurate/complete e-mail transmission and receipt.
         1. Proposal submission e-mails that are successfully received by the [proposals@maine.gov](mailto:proposals@maine.gov) inbox will receive an automatic reply stating as such.
      2. E-mails containing links to file sharing sites or online file repositories will not be accepted as submissions. Only e-mail proposal submissions that have the actual requested files attached will be accepted.
      3. Encrypted e-mails received which require opening attachments and logging into a proprietary system will not be accepted as submissions. Please check with your organization’s Information Technology team to ensure that your security settings will not encrypt your proposal submission.
      4. File size limits are 25MB per e-mail. Bidders may submit files separately across multiple e-mails, as necessary, due to file size concerns. All e-mails and files must be received by the due date and time listed above.
      5. Bidders are to insert the following into the subject line of their e-mail proposal submission: **“RFP# 202406117 Proposal Submission – [Bidder’s Name]”**
      6. Bidder’s proposal submissions are to be broken down into multiple files, with each file named as it is titled in bold below, and include:

* **File 1 [Bidder’s Name] – Preliminary Information:**

*PDF format preferred*

**Appendix A** (Proposal Cover Page)

**Appendix B** (Debarment, Performance and Non-Collusion Certification)

* **File 2 [Bidder’s Name] – Organization Qualifications and Experience:**

*PDF format preferred*

**Appendix C** (Organization Qualifications and Experience Form)

**Appendix D** (Subcontractors Form), if applicable

**Appendix E** (Litigation Form)

All required information and attachments stated in PART IV, Section II.

* **File 3 [Bidder’s Name] – Proposed Services:**

*PDF format preferred*

**Appendix F** (Response to Proposed Services Form)

All required information and attachments stated in PART IV, Section III.

* **File 4 [Bidder’s Name] – Cost Proposal:**

*Excel format preferred*

**Appendix G** (Cost Proposal Form)

All required information and attachments stated in PART IV, Section IV.

**PART IV PROPOSAL SUBMISSION REQUIREMENTS**

This section contains instructions for Bidders to use in preparing their proposals. The Department seeks detailed yet succinct responses that demonstrate the Bidder’s qualifications, experience, and ability to perform the requirements specified throughout the RFP.

The Bidder’s proposal must follow the outline used below, including the numbering, section, and sub-section headings. Failure to use the outline specified in PART IV, or failure to respond to all questions and instructions throughout the RFP, may result in the proposal being disqualified as non-responsive or receiving a reduced score. The Department, and its evaluation team, has sole discretion to determine whether a variance from the RFP specifications will result either in disqualification or reduction in scoring of a proposal. Rephrasing of the content provided in the RFP will, at best, be considered minimally responsive.

Bidders are not to provide additional attachments beyond those specified in the RFP for the purpose of extending their response. Additional materials not requested will not be considered part of the proposal and will not be evaluated. Include any forms provided in the submission package or reproduce those forms as closely as possible. All information must be presented in the same order and format as described in the RFP.

**Proposal Format and Contents**

**Section I Preliminary Information** (File #1)

* 1. **Proposal Cover Page**

Bidders must complete **Appendix A** (Proposal Cover Page). It is critical that the cover page show the specific information requested, including Bidder address(es) and other details listed. The Proposal Cover Page must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

* 1. **Debarment, Performance and Non-Collusion Certification**

Bidders must complete **Appendix B** (Debarment, Performance and Non-Collusion Certification Form). The Debarment, Performance and Non-Collusion Certification Form must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

**Section II Organization Qualifications and Experience** (File #2)

* 1. **Overview of the Organization**

Bidders must complete **Appendix C** (Qualifications and Experience Form) describing their qualifications and skills to provide the requested services in the RFP. Bidders must include three (3) examples of projects within the last five (5) years, demonstrating their experience and expertise in performing these services, as well as highlighting the Bidder’s stated qualifications and skills.

* 1. **Subcontractors**

If subcontractors are to be used, including consultants, Bidders must complete **Appendix D** (Subcontractors Form) by providing a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors’ organizational capacity and qualifications.

* 1. **Litigation**

Bidders must complete **Appendix E** (Litigation Form) providing a list of all current litigation in which the Bidder is named and a list of all closed cases that have closed within the past five (5) years in which the Bidder paid the claimant either as part of a settlement or by decree.  For each, list the entity bringing suit, the complaint, the accusation, amount, and outcome. If no litigation has occurred, write “none” on **Appendix E** (Litigation Form).

* 1. **Financial Viability**

Bidders must provide the following information for each of the past three (3) tax years:

* + 1. Balance Sheets
    2. Income (Profit/Loss) Statements
  1. **Certification**

1. Bidders must provide documentation of certification to offer CEU credits to licensed professionals in the State.
   * + - 1. If the Bidder does not have certification to offer CEUs, provide a plan of how CEUs would be offered.
       1. Bidders must provide documentation of PCI-DSS Certification.
          1. If the Bidder does not currently have PCI-DSS Certification, provide the plan including a timeline of when certification will be obtained. PCI-DSS Certification must be obtained prior to execution of a final contract.
   1. **Certificate of Insurance**

Bidders must provide a valid certificate of insurance on a standard ACORD form (or the equivalent) evidencing the Bidder’s general liability, professional liability and any other relevant liability insurance policies that might be associated with the proposed services.

|  |  |
| --- | --- |
| **Required Attachments Related to Organization Qualifications and Experience** | |
| **Attachment #:** | **Attachment Name:** |
| One (1) | Qualifications and Experience Form |
| Two (2) | Subcontractors Form |
| Three (3) | Litigation |
| Four (4) | Financial Viability |
| Five (5) | CEU Certification/Plan |
| Six (6) | Certificate of Insurance |

Attachments 1 – 6, must be included in numerical order, as part of File 2, as outlined in PART III “Submitting the Proposal” of this RFP. Attachments 1 – 6 will be reviewed and evaluated by the Department’s evaluation team under the Organization Qualifications and Experience section of this RFP.

**Section III Proposed Services** (File #3)

Bidder must complete **Appendix F** (Response to Proposed Services Form) by providing a detailed response to the requirements outlined in this RFP.

|  |  |
| --- | --- |
| **Required Attachments Related to Proposed Services** | |
| **Attachment #:** | **Attachment Name:** |
| Seven (7) | Job Descriptions |
| Eight (8) | Staffing Plan |
| Nine (9) | Implementation - Work Plan |

Attachments 7 – 9, must be included in numerical order, as part of File 3, as outlined in PART III “Submitting the Proposal” of this RFP. Attachments 7 – 9 will be reviewed and evaluated by the Department’s evaluation team under the Proposed Services section of this RFP.

**Section IV Cost Proposal** (File #4)

* 1. **General Instructions**
     1. Bidders must submit a cost proposal that covers the initial period of performance, starting 9/1/2024 and ending on 6/30/2025.
     2. The cost proposal must include the costs necessary for the Bidder to fully comply with the contract terms, conditions, and RFP requirements.
     3. No costs related to the preparation of the proposal for the RFP, or to the negotiation of the contract with the Department, may be included in the proposal. Only costs to be incurred after the contract effective date that are specifically related to the implementation or operation of contracted services may be included.
  2. **Cost Proposal Form Instructions**

Bidders must fill out **Appendix G** (Cost Proposal Form), following the instructions detailed here and in the form. Failure to provide the requested information, and to follow the required cost proposal format provided, may result in the exclusion of the proposal from consideration, at the discretion of the Department.

**PART V PROPOSAL EVALUATION AND SELECTION**

Evaluation of the submitted proposals will be accomplished as follows:

1. **Evaluation Process – General Information**
   1. An evaluation team, composed of qualified reviewers, will judge the merits of the proposals received in accordance with the criteria defined in the RFP.
   2. Officials responsible for making decisions on the award selection will ensure that the selection process accords equal opportunity and appropriate consideration to all who are capable of meeting the specifications. The goals of the evaluation process are to ensure fairness and objectivity in review of the proposals and to ensure that the contract is awarded to the Bidder whose proposal provides the best value to the State of Maine.
   3. The Department reserves the right to communicate and/or schedule interviews/presentations with Bidders, if needed, to obtain clarification of information contained in the proposals received. The Department may revise the scores assigned in the initial evaluation to reflect those communications and/or interviews/presentations. Changes to proposals, including updating or adding information, will not be permitted during any interview/presentation process and, therefore, Bidders must submit proposals that present their rates and other requested information as clearly and completely as possible.
2. **Scoring Weights and Process**
   1. **Scoring Weights:** The score will be based on a 100-point scale and will measure the degree to which each proposal meets the following criteria.

**Section I. Preliminary Information (No Points)**

Includes all elements addressed above in Part IV, Section I.

**Section II. Organization Qualifications and Experience (25 points)**

Includes all elements addressed above in Part IV, Section II.

**Section III. Proposed Services (40 points)**

Includes all elements addressed above in Part IV, Section III.

**Section IV. Cost Proposal (35 points)**

Includes all elements addressed above in Part IV, Section IV.

* 1. **Scoring Process:** The evaluation team will use a consensus approach to evaluate and score Sections II & III above. Members of the evaluation team will not score those sections individually but, instead, will arrive at a consensus as to assignment of points for each of those sections. Section IV, the Cost Proposal, will be scored as described below.
  2. **Scoring the Cost Proposal:** The total cost proposed for conducting all the functions specified in the RFP will be assigned a score according to a mathematical formula. The lowest bid will be awarded **35** points. Proposals with higher bid values will be awarded proportionately fewer points calculated in comparison with the lowest bid.

The scoring formula is:

(Lowest submitted cost proposal / Cost of proposal being scored) x 35 = pro-rated score

No Best and Final Offers: The State of Maine will not seek or accept a best and final offer (BAFO) from any Bidder in this procurement process.  All Bidders are expected to provide their best value pricing with the submission of their proposal.

* 1. **Negotiations:** The Department reserves the right to negotiate with the awarded Bidder to finalize a contract. Such negotiations may not significantly vary the content, nature or requirements of the proposal or the Department’s Request for Proposal to an extent that may affect the price of goods or services requested. The Department reserves the right to terminate contract negotiations with an awarded Bidder who submits a proposed contract significantly different from the proposal they submitted in response to the advertised RFP. In the event that an acceptable contract cannot be negotiated with the highest ranked Bidder, the Department may withdraw its award and negotiate with the next-highest ranked Bidder, and so on, until an acceptable contract has been finalized. Alternatively, the Department may cancel the RFP, at its sole discretion.

1. **Selection and Award**
   1. The final decision regarding the award of the contract will be made by representatives of the Department subject to approval by the State Procurement Review Committee.
   2. Notification of conditional award selection or non-selection will be made in writing by the Department.
   3. Issuance of the RFP in no way constitutes a commitment by the State of Maine to award a contract, to pay costs incurred in the preparation of a response to the RFP, or to pay costs incurred in procuring or contracting for services, supplies, physical space, personnel or any other costs incurred by the Bidder.
   4. The Department reserves the right to reject any and all proposals or to make multiple awards.
2. **Appeal of Contract Awards**

Any person aggrieved by the award decision that results from the RFP may appeal the decision to the Director of the Bureau of General Services in the manner prescribed in [5 M.R.S.A. § 1825-E](http://www.mainelegislature.org/legis/statutes/5/title5sec1825-E.html) and [18-554 Code of Maine Rules Chapter 120](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-120).  The appeal must be in writing and filed with the Director of the Bureau of General Services, 9 State House Station, Augusta, Maine, 04333-0009 within 15 calendar days of receipt of notification of conditional contract award.

**PART VI CONTRACT ADMINISTRATION AND CONDITIONS**

1. **Contract Document**
   1. The awarded Bidder will be required to execute a State Service Contract with appropriate riders as determined by the issuing department.

Forms and contract documents commonly used by the Department can be found on the Department’s [Division of Contract Management website](https://www.maine.gov/dhhs/about/financial-management/contract-management).

* 1. Allocation of funds is final upon successful negotiation and execution of the contract, subject to the review and approval of the State Procurement Review Committee. Contracts are not considered fully executed and valid until approved by the State Procurement Review Committee and funds are encumbered. No contract will be approved based on an RFP which has an effective date less than fourteen (14) calendar days after award notification to Bidders. (Referenced in the regulations of the Department of Administrative and Financial Services, [Chapter 110, § 3(B)(i)](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-110).)

This provision means that a contract cannot be effective until at least 14 calendar days after award notification.

* 1. The State recognizes that the actual contract effective date depends upon completion of the RFP process, date of formal award notification, length of contract negotiation, and preparation and approval by the State Procurement Review Committee. Any appeals to the Department’s award decision(s) may further postpone the actual contract effective date, depending upon the outcome. The contract effective date listed in the RFP may need to be adjusted, if necessary, to comply with mandated requirements.
  2. In providing services and performing under the contract, the awarded Bidder must act as an independent contractor and not as an agent of the State of Maine.

1. **Standard State Contract Provisions**
   1. Contract Administration

Following the award, a Contract Administrator from the Department will be appointed to assist with the development and administration of the contract and to act as administrator during the entire contract period. Department staff will be available after the award to consult with the awarded Bidder in the finalization of the contract.

* 1. Payments and Other Provisions

The State anticipates paying the Contractor on the basis of net 30 payment terms, upon the receipt of an accurate and acceptable invoice. An invoice will be considered accurate and acceptable if it contains a reference to the State of Maine contract number, contains correct pricing information relative to the contract, and provides any required supporting documents, as applicable, and any other specific and agreed-upon requirements listed within the contract that results from the RFP.

**PART VII LIST OF RFP APPENDICES AND RELATED DOCUMENTS**

**Appendix A** – Proposal Cover Page

**Appendix B** – Debarment, Performance, and Non-Collusion Certification

**Appendix C** – Qualifications and Experience Form

**Appendix D** – Subcontractors Form

**Appendix E** – Litigation Form

**Appendix F** – Response to Proposed Services Form

**Appendix G** – Cost Proposal Form

**Appendix H** – Submitted Questions Form

**APPENDIX A**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

**PROPOSAL COVER PAGE**

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Bidder’s Organization Name:** | |  | | | | |
| **Vendor Customer Code**  (for current State of Maine vendors)**:** | | | | | VC | |
| **Chief Executive - Name/Title:** | |  | | | | |
| **Tel:** |  | | | **E-mail:** | |  |
| **Headquarters Street Address:** | |  | | | | |
| **Headquarters City/State/Zip:** | |  | | | | |
| ***(Provide information requested below if different from above)*** | | | | | | |
| **Lead Point of Contact for Proposal - Name/Title:** | | |  | | | |
| **Tel:** |  | | | **E-mail:** | |  |
| **Street Address:** | |  | | | | |
| **City/State/Zip:** | |  | | | | |

* This proposal and the pricing structure contained herein will remain firm for a period of 180 days from the date and time of the bid opening.
* No personnel currently employed by the Department or any other State agency participated, either directly or indirectly, in any activities relating to the preparation of the Bidder’s proposal.
* No attempt has been made, or will be made, by the Bidder to induce any other person or firm to submit or not to submit a proposal.
* The above-named organization is the legal entity entering into the resulting contract with the Department if they are awarded the contract.
* The undersigned is authorized to enter contractual obligations on behalf of the above-named organization.

*To the best of my knowledge, all information provided in the enclosed proposal, both programmatic and financial, is complete and accurate at the time of submission.*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX B**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

**DEBARMENT, PERFORMANCE, and NON-COLLUSION CERTIFICATION**

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

*By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:*

1. *Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.*
2. *Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:*
   1. *Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or contract.*
   2. *Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.*
3. *Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification.*
4. *Have not within a three (3) year period preceding this proposal had one or more federal, state, or local government transactions terminated for cause or default*.
5. *Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above-mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX C**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

## QUALIFICATIONS and EXPERIENCE FORM

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

|  |
| --- |
| **Present a brief statement of qualifications describing the history of the Bidder’s organization, especially regarding skills pertinent to the specific work required by the RFP and any special or unique characteristics of the organization which would make it especially qualified to perform the required work activities. You may expand this form and use additional pages to provide this information.** |
|  |

|  |
| --- |
| **Provide a description of three (3) projects that occurred within the past five (5) years which reflect experience and expertise needed in performing the functions described in Part II – Scope of Services to be Provided of the RFP.. Please note that contract history with the State of Maine, whether positive or negative, may be considered in rating proposals even if not provided by the Bidder.** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project One** | | | | |
| **Business Reference Name:** | |  | | |
| **Reference Contact Person:** | |  | | |
| **Telephone:** | |  | | |
| **E-Mail:** | |  | | |
| **Description of Project** | | | | |
| **Project Start Date** |  | | **Project End Date** |  |
|  | | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project Two** | | | | |
| **Business Reference Name:** | |  | | |
| **Reference Contact Person:** | |  | | |
| **Telephone:** | |  | | |
| **E-Mail:** | |  | | |
| **Description of Project** | | | | |
| **Project Start Date** |  | | **Project End Date** |  |
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| --- | --- | --- | --- | --- |
| **Project Three** | | | | |
| **Business Reference Name:** | |  | | |
| **Reference Contact Person:** | |  | | |
| **Telephone:** | |  | | |
| **E-Mail:** | |  | | |
| **Description of Project** | | | | |
| **Project Start Date** |  | | **Project End Date** |  |
|  | | | | |

**APPENDIX D**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

## SUBCONTRACTORS FORM

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

|  |
| --- |
| **If subcontractors, including consultants, are to be used, provide each individual subcontractor’s business or consultant’s name, contact person, address, phone number, and a brief description of the subcontractor’s organizational or consultant’s capacity and qualifications. Bidders may add additional Subcontractors/Consultants as needed.** |

|  |  |
| --- | --- |
| **Subcontractor/Consultant** | |
| **Subcontractor Business or Consultant’s Name:** |  |
| **Contact Person:** |  |
| **Address:** |  |
| **Phone Number:** |  |
| **E-Mail:** |  |
| **Subcontractor/consultant organizational capacity and qualifications** | |
|  | |

|  |  |
| --- | --- |
| **Subcontractor/Consultant** | |
| **Subcontractor Business or Consultant’s Name:** |  |
| **Contact Person:** |  |
| **Address:** |  |
| **Phone Number:** |  |
| **E-Mail:** |  |
| **Subcontractor/consultant organizational capacity and qualifications** | |
|  | |

**APPENDIX E**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

## LITIGATION FORM

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

|  |
| --- |
| **Provide a list of all current litigation in which the Bidder is named and a list of all closed cases that have closed within the past five (5) years in which the Bidder paid the claimant either as part of a settlement or by decree. For each, list the entity bringing suit, the complaint, the accusation, amount, and outcome. If no litigation has occurred, write “none.”** |

|  |  |
| --- | --- |
|  | |
| **Case #** |  |
| **Entity Filing Suit:** |  |
| **Complaint/Accusation:** |  |
| **Amount:** |  |
| **Outcome** |  |
|  | |
| **Case #** |  |
| **Entity Filing Suit:** |  |
| **Complaint/Accusation:** |  |
| **Amount:** |  |
| **Outcome** |  |
|  | |
| **Case #** |  |
| **Entity Filing Suit:** |  |
| **Complaint/Accusation:** |  |
| **Amount:** |  |
| **Outcome** |  |

**APPENDIX F**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

## RESPONSE TO PROPOSED SERVICES FORM

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

**The response to proposed services form may be obtained in a Word (.docx) format by double clicking on the document icon below.**



**APPENDIX G**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

**COST PROPOSAL FORM**

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |
| **Proposed Cost:** | **$** |

**Instructions:** The Bidder must complete and submit budget forms providing a detailed breakdown of expenses in performing the services for the initial period of performance as described in this RFP and in the Bidder’s proposal. The total expenses amount is the proposed cost to be used in the scoring cost formula for evaluation purposes.

**The Budget Form may be obtained in an Excel (.xlsx) format by double clicking on the document icon below.**



|  |  |  |  |
| --- | --- | --- | --- |
| Bidders may include a menu of additional conference services, if not mentioned in the scope, that may be desirable, with costs, for the Department to select as options. Any additional services/cost will not be evaluated or considered in the scoring of the cost proposal. | | | |
| **Services to be Offered** | | **Description** | **Cost** |
|  |  |  |  |
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**APPENDIX H**

**State of Maine**

**Department of Health and Human Services**

**Maine Center for Disease Control and Prevention**

**SUBMITTED QUESTIONS FORM**

**RFP# 202406117**

**Planning and Coordination for the Statewide Infectious Disease Conference**

This form should be used by Bidders when submitting written questions to the RFP Coordinator as defined in Part III of the RFP.

If a question is not related to any section of the RFP, enter “N/A” under the RFP Section & Page Number. Add additional rows as necessary. Submit this document in WORD format, not PDF.

|  |  |
| --- | --- |
| **Organization Name:** |  |

|  |  |
| --- | --- |
| **RFP Section & Page Number** | **Question** |
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