

**“Template”**

*(Note: All informational text in italics should be removed prior to release to suppliers. This template may be used for both California Multiple Award Schedule (CMAS) and Master Agreement (MA) Requests for Offer.)*

**REQUEST FOR OFFER**

**RFO #:** \_\_\_\_\_  
*(Insert department assigned RFO number)*

**For:**

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(Insert name of project or other RFO identifier)

**LPAER No:** \_\_\_\_\_

*(Note: If this RFO will exceed the \$\$ threshold of the Master, insert the Master Agreement Exemption # here)*

**For:** \_\_\_\_\_  
*(For CMAS insert the product and/or services category name.)*  
*(For Master Agreement insert the MA title.)*  
*(Note: this is NOT a contract number)*

Date: \_\_\_\_\_

**You are invited to review and respond to this Request for Offer (RFO). To submit an offer for these goods and/or services, you must comply with the instructions contained in this document as well as the requirements stated in the State’s Scope of Work (SOW), Attachment A and B. By submitting an offer, your firm agrees to the terms and conditions stated in this RFO and your proposed MA or CMAS contract.**

**Read the attached document carefully. The RFO due date is:** (insert the day/month/year and time as found in the attached document). **Responses to this RFO and any required copies must be submitted by** (Identify the acceptable response method, i.e. mail, fax or electronic mail), **clearly labeled to the department contact noted below.**

**Department Contact:**

(Department Contact name)  
(Department name)  
(Department Address)  
(Contact phone #, fax #, & email address)

# Request for Offer

## General Information

### 1. Background and Purpose of the RFO

*(The department should provide enough information here to entice the reader to provide a response. This section should reference more detailed information to be found in the State’s Scope of Work (SOW). Other pertinent information to be included here are targeted start dates and estimate timeframe for project duration.)*

### 2. Key Dates

It must be understood that time is always of the essence, both for the RFO submittal and contract completion. Offeror’s are advised of the key dates and times shown below and are expected to adhere to them.

<u>Event</u>	<u>Date</u>
1. Release of RFO	_____
2. RFO Response Submission Due date (and time)	_____
3. Contractor Presentations and Interviews (as appropriate)	_____
4. Anticipated Contract Award	_____

### 3. RFO Response Requirements

This RFO and the offeror’s response to this document will be made part of the ordering department’s Purchase Order and procurement contract file.

Responses must contain all requested information and data and conform to the format described in this section. It is the offeror’s responsibility to provide all necessary information for the State to evaluate the response, verify requested information and determine the offeror’s ability to perform the tasks and activities defined in the State’s Scope of Work, Attachment A and Cost Worksheet, Attachment B provided as required below.

The offeror must submit XX copies of their response to the department contact name and address contained on the cover sheet to this RFO.

### 4. RFO Response Content

The majority of the information required to respond to this RFO is contained in the State’s Scope of Work, Attachment A and Cost Worksheet, Attachment B.

- a) Response to State’s Scope of Work, Attachment A:  
*(The following is an example of items that may be required in the State’s Scope of Work and some of these may be more suited to services than to goods.)*

The offeror’s “Statement of Work” responds to the State’s Scope of Work and will be used to evaluate responsiveness to requirements. This Statement of Work response must map each task/deliverable item back to the Attachments. The response must include any additional information that the offeror deems

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necessary to explain how the Contractor intends to meet the State’s requirements. The Statement of Work needs to contain the following as appropriate:

1. Overview of the required tasks and outcomes,
2. Description of how the tasks will be performed,
3. Work plan for each task, including sub-task description,
4. Samples of work from other projects, or outlines of what deliverables are proposed for the required Tasks,
5. Organization chart that identifies the proposed contract team,
6. Resumes for each identified member of the contract team, detailing experience meeting the State’s requirements,
7. Any other requirements shown in the State’s Scope of Work document. *(Note: Administrative requirements such as DVBE/TACPA/LAMBRA/EZA and Small Business should have been covered in the Master Contract competition. If the department will allow use of subcontractors, then the Scope of Work must require the offeror to list the firm name, address, contact person and address. Subcontractors are subject to all the terms, conditions and requirements of this subsequent contract.)*

b) Response to Attachment B:

Response to the Cost Worksheet, Attachment B. If cost only, this Attachment will outline the costs required to be provided by the offeror. If best value, this Attachment will detail the staff hours by classification, hourly rate per classification, by task(s) and deliverable(s), see format in Attachment B. These costs must map by each classification to the offeror’s Statement of Work.

5. Presentations and/or Interviews

The Request for Offer may at each department’s discretion request a presentation and/or interview from any or all offeror’s. This information will be described in detail in the RFO, Exhibit A and will be included in the Key Dates as described in Section 2 above. If required, the offeror’s proposed key project staff identified on the Organization Chart must be in attendance.

#### **Review of Offers for Award**

Responses to this RFO will first be reviewed for responsiveness to the requirements of Exhibit A and B. If a response is missing information required in either Attachment it may be deemed not responsive. Further review is subject to department’s discretion.

Award of a contract resulting from this RFO against a CMAS contract will be based on a “best value” method that includes cost as a factor.

Offers against a Master Agreement may use either a “low cost” method or may use the best value method described in the Master Agreement’s User Instructions. *(Refer to the User Instructions for language to include for both types of methods and for information on how the methods will be used. This language must **NOT** be changed.)*

*If the “low cost” method is selected, the department should refer to the Attachment B, Cost Worksheet, itemized line item costs and recheck the Grand Total dollars, and complete the Worksheet to determine the winning offer.*

*If the “best value” method is selected, the department should detail in this section the criteria and corresponding points that will be used to determine the winning offer.*

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For example:

Administrative Criteria	20%	60 points
Technical Criteria	30%	90 points
Cost	<u>50%</u>	<u>150 points</u>
Total	100%	300 points

An example of Administrative Criteria is:

- The Organization Chart identifies all proposed project team members and tracks each person to the pertinent task – 25 points maximum
- Resumes are included for each proposed project team member and they describe the experience levels in detail, support the Statement of Work, more experience and more points – 35 points maximum

An example of Technical Criteria is:

- Outlines and examples of deliverables from other projects are acceptable and support the Statement of Work – 20
- Proposed Tasks and Deliverables accomplish the project goals – 40
- Work Plan supports the Tasks and Deliverables proposed in the Statement of Work – 30

The RFO should also show the “best value” calculation as an example such as:

	<u>Offer 1</u>	<u>Offer 2</u>	<u>Offer 3</u>
Admin Score	30 pts	40 pts	54 pts
Tech Score	<u>62 pts</u>	<u>65 pts</u>	<u>66 pts</u>
<u>Total Points</u>	92	105	120
Cost	<u>\$330,000</u> <u>\$285,000</u>	<u>\$285,000</u> <u>\$285,000</u>	<u>\$420,000</u> <u>\$285,000</u>
Cost points	.86 x 150 = 129.5	100 x 150 = 150	.68 x 150 = 101.7
<b>Grand Total</b>	<b>92 + 129.5 = 221.5</b>	<b>105 + 150 = 255</b>	<b>120 + 101.7 = 221.7</b>

In this example, the award goes to Offer 2 as the response that scored the highest points from amongst the Administrative and Technical Criteria as shown in the RFO, combined with the calculated Cost points.

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### ATTACHMENT A – SCOPE OF WORK

*(At a minimum use this outline to detail the requirements of this Request for Offer. Based on the information in this Scope of Work, suppliers making an offer will use this document to prepare and submit their Statement of Work to respond to this RFO. The SOW may include confidentiality and conflict of interest requirements that may be unique to the department’s mission or internal policies.)*

- A. **Scope and Description** – *this is the how, what, when and where*
- B. **Contractor Tasks and Responsibilities** – *list tasks the Contractor must perform*
- C. **Deliverables** – *list expected deliverables, i.e., reports, meetings, committee assignments, etc. These will be used to judge acceptance and when accepted will be used to justify payment.*
- D. **Acceptance Criteria** – *When applicable include language such as “It shall be the State’s sole determination as to whether a deliverable has been successfully completed and acceptable to the State. There must be a signed acceptance document for each deliverable before invoices can be processed for payment.”*

*Acceptance criteria shall consist of the following:*

  - 1. *Reports on written deliverables are completed as specified and approved.*
  - 2. *All deliverables must be in a format that can be used by the State.*
  - 3. *If a deliverable is not accepted, the State shall provide the rationale in writing within 5 days of receipt of the deliverable or upon completion of acceptance testing period.*
- E. **Other Reporting Requirements**
  - 1. *On a (weekly or monthly) basis, each contractor staff person shall complete a timesheet.*
  - 2. *The contractor will develop and provide ad hoc reports as deemed appropriate and necessary by the State.*
- F. **State Responsibilities**

*Provide access to business and technical documents as necessary for the contractor to complete the tasks identified in the department’s purchase document.*
- G. **Travel**

*If travel reimbursement has been agreed to by the department, the department needs to iterate the agreed upon rates and expenses here. Only if travel allowed by the MA or CMAS contract.*

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### ATTACHMENT B – COST WORKSHEET

*(This worksheet is an example of how a department should request costs for a consulting services Request for Offer. Suppliers will use this document to prepare their corresponding document. Types of classifications will vary depending on the project.)*

<b>Job Title or Classification</b>	<b>Hours</b>	<b>Rate Per Hour</b>	<b>Extended Total</b>	<b>Task # or Name</b>
Senior Project Manager				
Project Manager				
Sr. Tech. Lead				
Technical Lead				
Application Analyst				
Systems Analyst				
Sr. Programmer				
Staff Programmer				
Assoc. Programmer				
Instructor				

Subtotal \$ \_\_\_\_\_

Other Costs, Travel, (if allowed) etc. + \_\_\_\_\_

**Total Costs** \$ \_\_\_\_\_