REQUEST FOR PROPOSALS
RFP RFx Number: 312002222
Design, Print, and Direct Mail Services
Issue Date: June 16, 2021

CLOSING TIME AND DATE
Proposals must be received by:
1:00 PM CST, July 16, 2021

CLOSING LOCATION
Mississippi Department of Finance and Administration
Office of Insurance, Suite 901-B Woolfolk Building
501 North West Street
Jackson, Mississippi 39201

PROPOSAL COORDINATOR
Alicia Coleman, MDFA OI Procurement Director
Telephone: (601) 359-9271
E-mail: InsuranceRFP@dfa.ms.gov
GENERAL INSTRUCTIONS

Section 1 – Background, Authority, and Purpose

The Mississippi Department of Finance and Administration (MDFA), Office of Insurance (OI) has issued this solicitation for the purpose of attaining sealed competitive proposals from qualified vendors to provide comprehensive design, print, and direct mail services. These services include, but are not limited to, designing, printing, labeling, sorting, bulk mailing and providing related services for Mississippi’s State and School Employees’ Health Insurance Plan’s (Plan) quarterly newsletters, Plan Document booklets, and miscellaneous other mass mail-outs for the Plan and the Mississippi State Agencies Self-Insured Workers’ Compensation Trust (Trust). The MDFA desires to contract with an experienced vendor that possesses the necessary abilities and resources to provide the services specified within this Request for Proposal (RFP).

The MDFA seeks to enter into a multi-term, firm fixed price, requirements contract for the aforementioned services. This RFP, any amendment thereto, such as Questions and Answer document(s) and Summary of Pre-Proposal Conference, Tour, or Site Visit, if any were issued, as well as the awarded Vendor’s proposal, and any requested best and final offer shall constitute the Contract.

The initial period of performance of any contract resulting from this RFP will be four years, tentatively scheduled to begin on or about September 1, 2021 and to end on August 31, 2025. The MDFA reserves the right to renew the Contract for up to one additional year at the sole discretion of the MDFA. By October 1, 2024, MDFA will notify the Vendor, in writing, of MDFA’s intent to renew the Contract for the one (1) additional year.

Section 2 – Timeline

Request for Proposal Issue Date: June 16, 2021
Questions and Requests for Clarification to MDFA Deadline: June 30, 2021, 5:00 PM CST
Anticipated Posting of Written Answers to Questions: July 7, 2021, 5:00 PM CST
Proposal Package Submission Deadline: July 16, 2021 1:00 PM CST
Proposal Opening: July 16, 2021, 1:30 PM CST
Anticipated Date of the Notice of Intent to Award: July 23, 2021, 5:00 PM CST
Anticipated Post-Award Debriefing Request Due Date: July 28, 2021, 5:00 PM CST
Anticipated Post-Award Debriefing Held By Date: July 30, 2021, 5:00 PM CST
Anticipated Protest Deadline Date: July 30, 2021, 5:00 PM CST

Section 3 – Contact and Questions/Requests for Clarification

3.1 Vendors must carefully review this solicitation, the Contract, risk management provisions, and all attachments for defects, questionable, or objectionable material. Following review, vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the questions and requests for clarifications, vendors
shall submit any such question via email by the deadline reflected in Section 2. All questions and requests for clarifications must be directed by email to:

**Alicia Coleman, MDFA OI Procurement Director**  
**E-mail: InsuranceRFP@dfa.ms.gov**

3.2 Vendors should enter “RFP RFx Number 3120002222 - Questions” as the subject for the email. Question submittals should include a reference to the applicable RFP section and be submitted in the format shown below:

<table>
<thead>
<tr>
<th>RFP Section, Page Number</th>
<th>Vendor Question/Request for Clarification</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
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</tbody>
</table>

3.3 Official responses will be provided only for questions submitted as described above and only to clarify information already included in the RFP. The identity of the organization submitting the question(s) will not be revealed. All questions and answers will be published on the Mississippi Contract/Procurement Opportunity Search Portal website and the agency's website as an amendment to the RFP by the date and time reflected in Section 2.

3.4 The MDFA will not be bound by any verbal or written information that is not contained within this RFP unless formally noticed and issued by the contact person as an RFP amendment. Vendors are cautioned that any statements made by MDFA personnel that materially change any portion of the proposal document shall not be relied upon unless subsequently ratified by a formal written amendment to the proposal document.

3.5 All vendor communications regarding this RFP must be directed to the Proposal Coordinator. Unauthorized contact regarding the RFP with other employees of the MDFA may result in the Vendor being disqualified, and the Vendor may also be suspended, disbarred, or removed from consideration for award of contracts with the State of Mississippi for a period of two (2) years.

3.6 **Pre-Proposal Conference, Tour, or Site Visit:** No pre-proposal conference, tour, or site visit will be held for this RFP.

3.7 **Acknowledgement of Amendments:** Should an amendment to the RFP be issued, it will be posted on the Mississippi Contract/Procurement Opportunity Search Portal website and the agency's website in a manner that all vendors will be able to view. Vendors must acknowledge receipt of any amendment to the solicitation by signing and returning the amendment with the proposal package, by identifying the amendment number and date in the space provided for this purpose on the RFP amendment, or by letter. The acknowledgment should be received by the MDFA by the time, date, and at the place specified for receipt of proposals. It is the Vendor’s sole responsibility to monitor the websites for any updates or amendments to the RFP. Questions and Answer document(s) and/or Summary of Pre-Proposal Conference, Tour, or Site Visit, if any are issued/posted on the Mississippi Contract/Procurement
Opportunity Search Portal website and the agency's website, must be treated the same as an RFP Amendment.

3.8 The RFP is comprised of the base RFP document, any attachments, any amendments issued prior to the submission deadline, and any other documents released before contract award.

Section 4 – Scope of Services/Specifications

This section contains information on services and procedures that the Vendor must provide or adhere to, in servicing the MDFA OI’s account, either directly or through identified subcontractors. The descriptions are not all-inclusive, but are provided to alert you to services or procedures that may require additional planning or programming on your part. The following is a list of services the MDFA expects the successful Vendor to provide.

Please respond by restating each service listed below, including the number, and confirm your intention to provide the service as described, respond by stating, “Confirmed”. If your company can provide the service, but not exactly as described, respond by stating, “Confirmed, but with exceptions”, and state the specific exceptions. If your company is currently unable to provide a listed service, respond by stating, “Unable to provide this service”. Any additional details regarding these services should be provided in your responses to the questionnaire, or as additional information included as an appendix to your proposal.

4.1 Vendor shall provide the following services/projects, and otherwise do all things necessary for or incidental to the performance of work, as set forth below:

4.1.1 Newsletter - Two to four times per year, the MDFA produces a newsletter to be mailed to the homes of participants in the Plan. Each newsletter consists of four or six printed 8.5" x 11" pages, two-color or four-color, bi-folded down to 5.5" x 8.5" or tri-folded down to 3.625" x 8.5", 80 lb. gloss text paper and tabbed to be a self-mailer ½", printed, labeled and delivered to an appropriate United States Postal Service (USPS) postal facility for bulk mailing. Estimated Quantity: 136,000

4.1.2 Plan Document booklet - The MDFA produces a new Plan Document booklet in the fall of each year and distributes these booklets on request to the aforementioned Plan Participants. A copy of the 2021 Plan Document is available on the State and School Employees’ Life and Health Insurance Plan’s website available at https://knowyourbenefits.dfa.ms.gov/publications/ for your reference. The booklet is traditionally designed to be a self-mailer document containing from 100 to 120 printed 8.5" x 11" pages, one-color (with two-color cover) consisting of 20 lb. bond paper for inside pages and 80 lb. uncoated cover with perfect bound/binding spine either saddled-stitched or glue bound, to be printed, boxed and stored until distribution, and mailed as requested. Estimated Quantity: 5,500
4.1.3 One Plan Document Letter - A single sided 8.5"x 11" two-color or four-color 60 lb. offset letter to be bi-folded down to 5.5" x 8.5" or tri-folded down to 3.625" x 8.5", inserted into Business No. 10 24 lb. envelopes, printed, labeled and delivered to an appropriate USPS postal facility for bulk mailing. Estimated Quantity: 136,000

4.1.4 One Plan Document Request Letter – A double sided 8.5"x 11" two-color or four-color 60 lb. offset letter to be bi-folded down to 5.5" x 8.5" or tri-folded down to 3.625" x 8.5", and tabbed, designed to MDFA’s specifications, inserted into Business No. 10 24 lb. envelopes, printed, labeled and delivered to an appropriate USPS postal facility for bulk mailing. Estimated Quantity: 136,000

4.1.5 Plan Document Request Fulfillment – Plan Document requests are returned to Ol. Ol logs participant name and address into a spreadsheet that is shared periodically with Vendor. Vendor will use spreadsheet to mail a Plan Document to participants requesting a hardcopy within five (5) days of receipt of file from Ol. Estimated Quantity: 1,200

4.1.6 Post Card – 8.5" x 5.5" standard size post card; 100 lb. matte finish. Estimated Quantity: 136,000

4.1.7 Other ad hoc material – MDFA may also produce certain ad hoc materials to be distributed to some or all of the Plan and/or Trust participants. Ad hoc projects typically consist of one or more printed pages bi-folded down to 5.5" x 8.5" or tri-folded down to 3.625" x 8.5", and inserted into Business No. 10 24 lb. envelopes, printed, labeled and delivered to an appropriate USPS postal facility for bulk mailing. Estimated Quantity: 136,000

4.1.8 Print Design - For each project, copy and any preferred design concepts will be provided by the MDFA to the selected Vendor in Microsoft Word® or similar format. The Vendor will be responsible for designing each project, incorporating all copy and any preferred design concepts provided by the MDFA.

4.1.9 The Vendor will be responsible for accepting raw copy, designing the documents to the client’s specifications, producing the documents, affixing name and address information on each piece of mail described, and for transporting same to an appropriate USPS postal facility in the appropriate format and sorting to ensure that the documents are deliverable and qualify for maximum postal discounts. As all bulk mailing will use the MDFA’s bulk (presorted Standard) mailing permit number, postage costs are not to be included as the MDFA has its own bulk (presorted Standard) mail permit number. All discounts, savings, and/or rebates relative to postal charges for the aforementioned mailings will inure to the MDFA and not the Vendor.

4.1.10 All quantities referenced are estimates, and can be expected to increase or decrease slightly throughout the term of the Contract. Material changes to project
specifications may be subject to negotiated pricing adjustments. The MDFA reserves the right to modify or cancel any of the aforementioned projects without penalty.

4.1.11 For the projects listed above, sufficient advance notice will be provided to the Vendor in order to facilitate scheduling. All design, printing, labeling and mailing of documents should be according to MDFA’s specifications and schedule.

4.1.12 Prior to each mailing project, OI will provide a current updated mailing list of approximately 136,000 records, using a Secure File Transfer (SFT) system or other appropriate storage media.

4.1.13 The Vendor must have the capacity to edit the mailing list in order to correct or eliminate undeliverable addresses, identify and remove duplications, and shall be responsible for Coding Accuracy Support System (CASS) certification of the addresses on each mailing list and all other applicable postal regulations, and perform appropriate formatting, merging, purging, and sorting to the mailing list to qualify mail pieces for maximum postal discounts and deliverability.

4.1.14 Various bulk plan documents are to be delivered to approximately 330 employer units, to OI, Blue Cross Blue Shield of Mississippi (BCBSMS), and some stored for individual mailing to Plan Participants.

4.1.15 The Vendor shall maintain, in a secure environment, printed material to be processed for mailings and must have sufficient equipment and available space to accept large shipments of printed documents. The Vendor shall be responsible for the safekeeping of such material until delivered to an appropriate USPS postal facility or to MDFA, as directed.

4.1.16 The selected Vendor is responsible for delivery of sorted, labeled items to an appropriate USPS postal facility, within the deadlines agreed upon by the Vendor and MDFA before each project begins.

4.1.17 MDFA anticipates possible additional mail-outs consisting of post cards, pre-stuffed envelopes, as well as items to be folded and/or inserted into envelopes (or tabbed to be processed as a self-mailer). Specifications for any additional projects will be determined as needed by MDFA.

4.1.18 The selected Vendor must cooperate with the MDFA and with all other vendors of the Board with respect to ongoing coordination and delivery of health plan services and in any transition of responsibilities.

4.2 The Vendor shall:
4.2.1 Assign a Vendor Account Representative to work directly with the MDFA Representative.

4.2.2 Perform all services provided in the Contract between the Vendor and the MDFA in accordance with customary and reasonable industry standards as well as in strict conformance to all laws, statutes, and ordinances and the applicable rules, regulations, methods and procedures of all government boards, bureaus, offices, and other agents. The Vendor shall be responsible for the complete performance of all work; for the methods, means, and equipment used; and for furnishing all materials, tools, apparatus, and property of every description used in connection therewith. No statement within this RFP shall negate compliance with any applicable governing regulation. The absence of detail specifications or the omission of detail description shall be recognized as meaning that only the best commercial practices are to prevail and that only first quality materials and workmanship are to be used.

Section 5 – Proposal Evaluation and Basis for Award

5.1 All proposals received in response to this RFP by the stated deadline will receive a comprehensive, fair, and impartial evaluation. A formal scoring methodology comprised of three phases – compliance, analysis, and finalist, will be utilized with each proposal required to pass the previous phase in order to qualify for further evaluation in the next phase. MDFA will use an evaluation committee to review and evaluate the proposals using a 100-point scale as well as consensus scoring. Consensus scoring involves solidarity or general agreement of opinion among evaluators, based on information and data contained in the RFP proposals. The evaluation of any proposal may be suspended and/or terminated at the MDFA's discretion at any point during the evaluation process at which time the MDFA determines that said proposal and/or Vendor fails to meet any of the mandatory requirements as stated in this RFP, the proposal is determined to contain fatal deficiencies to the extent that the likelihood of selection for contract negotiations is minimal, or MDFA receives reliable information that would make contracting with the Vendor impractical or otherwise not in the best interests of the MDFA and/or the State of Mississippi.

5.2 Compliance Phase: In this initial phase of the evaluation process, all proposals received are reviewed by the MDFA OI Procurement Director and/or designee to determine if mandatory RFP requirements have been satisfied, meaning whether a proposal/Vendor is responsive, responsible, and/or acceptable. Compliance requirements are not assigned a point percentage or score, but are simply recorded as Pass or Fail.

- Every statement containing “must,” “shall,” “will,” etc., is a mandatory requirement. Failure to respond leads to mandatory proposal disqualification. Such mandatory requirements are to be clear and (preferably) standing alone.
• Every statement containing “may,” “can,” “should,” etc., is a desirable requirement. Vendors may ignore these if they wish. The only penalty for doing so is a possible loss of scoring points if the requirement has scoring points tied to it.

A Pass score is assigned to each factor for which the response to the question(s) defined is “Yes.” In the event that any factor receives a Fail score or for some reason cannot be evaluated, an explanation of the problem or concern and the corresponding question must be evaluated and made part of the record, to include any allowable waivers.

Proposals with errors that do not alter the substance of the proposal can be accepted, and the MDFA OI Procurement Director may allow the Vendor to correct the problem prior to review as long as the irregularities are insignificant mistakes that can be waived or corrected without prejudice to other vendors. MDFA has the right to waive minor defects or variations of a proposal from the exact requirements of the specifications that do not affect the price, quality, quantity, delivery, or performance time of the services being procured. If insufficient information is submitted by a vendor with the proposal for the MDFA to properly evaluate the proposal, the MDFA has the right to require such additional information as it may deem necessary after the time set for receipt of proposals, provided that the information requested does not change the price, quality, quantity, delivery, or performance time of the services being procured. Discussions may be conducted with vendors who submit proposals determined to be reasonably susceptible of being selected for the award, but proposals may also be accepted without such discussions. If any component received a Fail score (a “No” response) on any item or contains an item which for some reason cannot be evaluated, it shall be deemed as non-responsive and/or non-responsible. Failure to comply with these RFP requirements may result in the proposal being eliminated from further consideration. All proposals which are determined to be responsive, responsible, and/or acceptable will continue on to next phase.

5.3 Analysis Phase: In this phase of the evaluation process, the evaluation committee utilizes consensus scoring to determine numerical scores for each proposal. The evaluation factors are listed in order of their relative importance and weight:

• **Cost (Weight/Value of 40%/Points)** – Cost is reviewed by the MDFA OI Procurement Director and/or designee as it is objectively scored based on the competitiveness of the proposed fees, rates, price, or cost offered. The lowest cost proposed will receive the maximum 40 points allocated to cost. The point allocations for cost on the other offers will be evaluated according to the following formula: Price of the lowest responsive and responsible offer divided by the price of the responsive and responsible offer being rated times the maximum 40 points allocated for cost equals the awarded points.

• **Technical (Weight/Value of 38%/Points)** – Technical factors are scored by the evaluation committee without knowledge of the identity of the Vendor (blind) and generally aid in determining the Vendor’s technical ability to perform the service or provide the commodity. The evaluation committee will provide consensus scores of the quality and
completeness of the Vendor’s solutions and action plans for providing the services identified as well as how well the proposal demonstrates an understanding, responsiveness, effectiveness, efficiency, and value to the MDFA in proposed approach.

- **Management (Weight/Value of 22%/Points)** – Management factors are scored with knowledge of the identity of the Vendor and generally aid in determining the Vendor’s past performance of the service or provision of the commodity. The evaluation committee will provide consensus scores of the personnel, equipment, and facilities to provide timely access to design, print and direct mail services for a plan of comparable size; the ability to technically implement and maintain the structure and resources for providing all services listed in this RFP, demonstrating where applicable the ability to perform the service reflected by technical training, education and general experience of staff and a documented record of past performance of providing design, print and direct mail services.

5.3 **Finalist Phase:** In this phase of the evaluation process, the evaluation committee seeks to determine from among the finalists whose proposal is the most advantageous to MDFA. Upon completion of the Analysis Phase, the evaluation committee reviews and compares the numerical scores from among the Vendors in order to determine finalists. The top scoring Vendor, as well as all other vendors with scores within ten points of the top scoring Vendor, will be named as finalists and will be further evaluated. This phase consists of the following components:

- **Finalist Presentations** – At MDFA’s discretion, all finalists may be required to make a presentation to the evaluation committee. If scheduled, individual finalist presentations shall be held either in Jackson, Mississippi, or virtually, to allow the evaluation committee the opportunity to conduct interviews of the finalists, and to confirm/clarify information provided in the submitted proposals or otherwise gathered during the evaluation process. Any substantial oral clarification shall be reduced to writing by the Vendor.

- **Best and Final Offer (BAFO)** – At MDFA’s discretion, all finalists may be given the opportunity to provide a BAFO relative to their cost proposal. MDFA will notify finalists if a BAFO may be submitted, and will establish a date and time for submission. Although a finalist is under no obligation to submit such an offer, any such BAFO should include any applicable revised financial exhibits and must be signed by an appropriate representative of your company. If a finalist chooses to not make a BAFO, the financial proposal included in your company’s response to this RFP will be considered as the BAFO. Unsolicited BAFOs, including but not limited to such offers submitted by non-finalists, will not be accepted. The numerical scores for the Cost factor from the Analysis Phase will be adjusted for any BAFO received from a finalist.

5.4 Upon completion of the evaluation of proposals, the evaluation committee will determine the top scoring proposal and provide a recommendation to the MDFA. The MDFA will make a determination as to the proposal deemed most advantageous to the MDFA and will
authorize the issuance of a notice of intent-to-award the Contract to the selected Vendor and authorize contract negotiations with the selected Vendor. Subsequent to such authorization by the MDFA, all participating vendors will be notified in writing of the contract award and will be afforded the opportunity to participate in a post-award vendor debriefings.

5.5 The MDFA intends to award one contract to provide the services described in this RFP to the responsible and responsive Vendor whose proposal is determined in writing to be the most advantageous to the State taking into consideration price and the evaluation factors set forth in this RFP. No other factors or criteria shall be used in the evaluation.

Section 6 – Minimum Vendor Qualifications

The following minimum Vendor requirements are mandatory. Failure to meet any of these requirements will result in disqualification of the proposal submitted by your company. Please respond by restating each minimum requirement, including the number, listed below with documentation that proves specifically how your company meets that minimum criteria. Please include in your responses the total number of years and types of experience of your company. If, in the opinion of the procurement team, you fail to prove that your company meets any of these minimum requirements, the proposal will be disqualified from further evaluation. If this happens, you will be notified of the decision and will have an opportunity to provide additional information to prove your company does meet the minimum requirements. It is incumbent upon the disqualified Vendor to respond timely and completely to any such notice as unreasonable delays and/or non-responsive submissions may result in the disqualification being upheld without further review.

The Vendor must have:

6.1 Prior Experience: Vendor must have been in business and provided services equivalent or similar in requirements and scale to those services described in this RFP for a minimum of four (4) years as of July 1, 2021. The determination of the length of time an entity has provided these services will be based upon the initial date the Vendor established a contractual relationship to provide such services. For each client, please specify:
- Client name, include the name, title, address, e-mail address, and phone number of a person whom we may contact to confirm as needed,
- The type of work your company provided to the client,
- Contract effective dates for the time period(s) your company provided services to the client.

6.2 Resources and Facilities: The Vendor must have adequate resources and facilities to render the requested services referenced herein. The Vendor must have in place as of the date of the proposal submission secure and accessible work and storage space, appropriate equipment for processing the aforementioned data and mail pieces, and adequate experienced staffing ready to begin performing the requested services.
6.3 A minimum score of six (6) on the Reference Score Sheet (Attachment D) from reference interviews by MDFA staff with two (2) vendor references (for a total minimum scoring requirement of twelve (12) points), as well as all other requirements of this RFP.

6.4 The Vendor may be required before the award of any contract to show to the complete satisfaction of the MDFA that it has the necessary facilities, ability, and financial resources to provide the service specified therein in a satisfactory manner. The Vendor may also be required to give a past history and references in order to satisfy the MDFA in regard to the Vendor’s qualifications. The MDFA may make reasonable investigations deemed necessary and proper to determine the ability of the Vendor to perform the work, and the Vendor shall furnish to the MDFA all information for this purpose that may be requested. The MDFA reserves the right to reject any proposal if the evidence submitted by, or investigation of, the Vendor fails to satisfy the MDFA that the Vendor is properly qualified to carry out the obligations of the Contract and to complete the work described therein. Evaluation of the Vendor’s qualifications shall include:

1. the ability, capacity, skill, and financial resources to perform the work or provide the service required;
2. the ability of the Vendor to perform the work or provide the service promptly or within the time specified, without delay or interference;
3. the character, integrity, reputation, judgment, experience, and efficiency of the Vendor; and,
4. the quality of performance of previous contracts or services.

Section 7 – Proposal Submission Requirements

7.1 Submission Format – Each vendor must submit their written proposal in the style and format outlined herein.

The proposal shall consist of three (3) separate sections: technical, cost, and management. Pursuant to Mississippi Code Annotated §§ 27-104-7 and 31-7-401 through 31-7-423, the State of Mississippi requires a blind evaluation of certain factors not requiring knowledge of the name of an offeror. All Vendor-identifying information shall be removed and/or redacted. Identifying information includes, but is not limited to, any prior, current and future names or addresses of the offeror, any names of incumbent staff, any prior, current and future logos, watermarks, and company colors, any information, which identifies the offeror as an incumbent, and any other information, which would affect the blind evaluation of technical factors. The Technical Section shall have no identifying information; while the Cost and Management Sections will be allowed to have identifying information. Any proposals that do not adhere to these requirements within the “Blind” copy described in Section 7.2.1 (b) below will be deemed non-responsive and may be rejected on that basis.

The three sections of the proposal shall be comprised of the following eleven (11) tabs. It is the Vendor’s responsibility to organize and separate the information into the sections and
tabs accordingly. Management Section consists of Tabs 1-2, 5-6, and 8-11; Cost Section is Tab 4; and Technical Section consist of Tabs 3 and 7.

**Tab 1 – Proposal Cover Sheet (Attachment A) containing narrative questionnaire:** Failure to complete and/or sign may result in Vendor being determined non-responsive. **Unauthorized modification or addition to any portion of the Attachment A may be cause for rejection of the proposal.**

In preparing your written response to narrative questionnaire, you are required to repeat each question, including the number, or requirement followed by your response. Please provide complete answers and explain all issues in a concise, direct manner. If you cannot provide a direct response for some reason (e.g., your company does not collect or furnish certain information), please indicate the reason rather than providing general information that fails to answer the question. “Will discuss” and “will consider” are not appropriate answers.

**Tab 2 – Minimum Vendor Requirements Confirmation:** Respond by restating each minimum Vendor requirement and document how your company meets these minimum criteria. Refer to RFP Section 6.

**Tab 3 – Scope of Services/Specifications Confirmation:** Respond by restating each service listed in RFP Section 4, Scope of Services/Specifications, and confirm your intention to provide the service as described by responding, “Confirmed”. If your company can provide the service, but not exactly as described, respond, “Confirmed, but with exceptions”, and state the specific exceptions. If your company intends to provide a listed service through a subcontractor, respond, “Confirmed, service will be provided through subcontractor”, and name the subcontractor. If your company is currently unable to provide a listed service, respond by stating, “Unable to provide this service”. Any additional details regarding these services should be provided in your responses to the questionnaire, or as additional information included as an appendix to your proposal.

**Tab 4 – Fee schedule (Attachment B)** - all pricing must be submitted on the fee schedule. Failure to complete and/or sign the fee schedule may result in Vendor being determined non-responsive. **Modification or addition to any portion of the Attachment B may be cause for rejection of the proposal.**

**Tab 5 – References (Attachment C)** - each vendor must furnish a listing of at least three (3) trade references along with the contact person, address, and phone number for each. These references must be familiar with the Vendor’s abilities in the areas involved with this solicitation. MDFA staff will use these references to determine the Vendor’s ability to perform the services. It is the responsibility of the Vendor to ensure that the reference contact information is correct and current. MDFA staff will not track down references. Vendors should verify before submitting their proposal that the contact
person and phone number are correct for each reference. **MDFA staff must be able to reach two (2) references for a vendor within two (2) business days of proposal opening** to be considered responsive. Further, the Vendor must score a minimum of six (6) points on each Reference Score Sheet which will be used by the MDFA staff when interviewing the two (2) references (for a total minimum scoring requirement of twelve (12) points) to be considered responsive and/or responsible. (See Section 6.3 and Attachments C and D.) Only vendors who are found responsive and/or responsible will have their proposals considered. Vendor may submit as many references as desired. MDFA staff will begin contacting references at the top of the list and will continue down the list until they have completed Reference Score Sheets for two (2) references. After two (2) score sheets are completed, the reference check process will end.

**Tab 6 – RFP Statement of Compliance and Exception(s) form (Attachment F)** – If a vendor objects to any terms, conditions, or requirements listed in the **MDFA OI’s Request for Proposal for Design, Print, and Direct Mail Services**, dated June 16, 2021, including all RFP attachments and amendments, the Vendor must list and explain the exceptions taken. If no exceptions are taken, then the Vendor shall state on the form “No Exceptions Taken.” Failure to indicate any exception will be interpreted as the Vendor’s intent to comply fully with the requirements as written. Failure to complete and/or sign may result in Vendor being determined non-responsive. Refer to RFP Sections 7.2.9-7.2.11 and 14.5.

**Tab 7 – Service Plan** – Address the following:
- **Security Procedures** - Describe the security procedures your company uses to protect mailing list files.
- **Timeline** - Based on the projects listed in Section 4, Scope of Services/Specifications, provide an estimated timeline for each project from design approval to delivery to an appropriate USPS postal facility.
- **Facility** - Describe the facility that will be used to provide the services required in this RFP, including but not limited to location, square footage, access, security, freight-handling capability, and storage capability.
- **Equipment** - Describe your resources or equipment that will be used to provide the services required in this RFP, including but not limited to computers, printers, folding machines, tabbing devices, inserters, labelers, metering devices, and trucks.

**Tab 8 – Signed Acknowledgment(s) of RFP Amendment(s) (if any were posted)**

**Tab 9 – Résumés for Key Staff** - Provide a complete résumé of key vendor staff who will be assigned to render services to the MDFA OI, including detailed information on any special training or designations. Specifically identify the graphic designer(s) and account executive who will serve as the primary contact for the MDFA OI. Provide
each person’s total number of years of experience related to the services being requested in the RFP.

**Tab 10 – Any Additional Information Not Specifically Requested:** If you have additional information you would like to provide, include it as Tab 10 to your proposal. It is the proposer’s sole responsibility to submit information relative to the evaluation of its proposal and the MDFA is under no obligation to solicit such information if it is not included with the proposal.

**Tab 11 – Design Samples:** Include samples of projects designed by the graphic designer(s) that will be assigned to render services to the MDFA.

### 7.2 Submission Requirements

#### 7.2.1

The signed original proposal package and an electronic copy (on CD, DVD or flash drive) of its proposal package submitted in a sealed envelope or package to the place identified for receipt of proposals (Section 7.2.3) no later than the time and date specified for receipt of proposals. The electronic files shall not be password protected, shall be in Portable Document Format (PDF®) or Microsoft Word and/or Microsoft Excel format, and shall be capable of being copied to other media including readable in Microsoft Word and/or Microsoft Excel. (Also see, 7.2.2 and 7.2.3) The procurement team, not the evaluation committee, will be the only ones with access to this electronic copy, which shall consist of the following:

a. One (1) electronic copy of the complete proposal including all attachments in a searchable Microsoft Office® format, preferably in Word® or PDF®;

b. One (1) BLIND electronic copy of the complete proposal including “blind” copies of all attachments and referenced documents in a searchable Microsoft Office® format, preferably in Word® or PDF®. The Vendor is responsible for ensuring that the “blind” copy shall have no identifying information, specifically within the technical proposal. This requirement is necessary to help ensure the anonymity of the vendors from the evaluation committee that will review proposals. Blind proposals containing Vendor-identifying information may be disqualified; and,

c. One (1) REDACTED electronic copy of the complete proposal including all attachments and referenced documents in a searchable Microsoft Office® format, preferably in Word® or PDF®, if the proposal contains confidential information, pursuant to Section 7.2.12 below.

#### 7.2.2

The sealed envelope or package shall be marked with the proposal opening date and time, and the number of the Request for Proposals (1:30 PM CST, July 16, 2021; RFP RFx Number 3120002222). Proposals are subject to rejection unless submitted with the information included on the outside the sealed proposal envelope or package.
7.2.3 Sealed proposals should be mailed or hand-delivered to and labeled as follows:

Address if mailing proposals:

RFP for Design, Print, and Direct Mail Services  
RFP RFx Number 3120002222  
Opening Date: 1:30 PM CST, July 16, 2021  
Mississippi Department of Finance & Administration, Office of Insurance  
Attention: Alicia Coleman, MDFA OI Procurement Director  
P.O. Box 24208  
Jackson, Mississippi 39225-4208  
SEALED PROPOSAL – DO NOT OPEN

Address if hand-delivering proposals:

RFP for Design, Print, and Direct Mail Services  
RFP RFx Number 3120002222  
Opening Date: 1:30 PM CST, July 16, 2021  
Mississippi Department of Finance & Administration, Office of Insurance  
Attention: Alicia Coleman, MDFA OI Procurement Director  
501 North West Street, Suite 901-B Woolfolk Building  
Jackson, Mississippi 39201  
SEALED PROPOSAL – DO NOT OPEN

7.2.4 All proposal packages must be received by the MDFA no later than 1:00 PM CST, July 16, 2021. Proposals submitted via facsimile (fax) machine will not be accepted. It is suggested that if a proposal is mailed to the MDFA, it should be posted in certified mail with a return receipt requested. The MDFA will not be responsible for mail delays or lost mail. All risk of late arrival due to unanticipated delay – whether delivered by hand, USPS, courier or other delivery service or method – is entirely on the Vendor. All vendors are urged to take the possibility of delay into account when submitting a proposal.

7.2.5 Timely submission of the proposal package is the responsibility of the Vendor. Proposals received after the specified time will be rejected and maintained unopened in the procurement file. A proposal received at the place designated in the solicitation for receipt of proposals after the exact time specified for receipt will not be considered unless it has been determined by the MDFA that the late receipt was due solely to mishandling by the MDFA after receipt at the specified address.

7.2.6 The time and date of receipt will be indicated on the sealed proposal envelope or package by MDFA staff. The only acceptable evidence to establish the time of receipt at the office identified for proposal opening is the time and date stamp of
that office on the proposal wrapper or other documentary evidence of receipt used by that office.

7.2.7 Each page of the proposal must be numbered. Multiple page attachments and samples should be numbered internally within each document, and not necessarily numbered in the overall page number sequence of the entire proposal. The intent of this requirement is for the Vendor to submit all information in a manner that it is clearly referenced and easily located.

7.2.8 Failure to submit a proposal on the fee schedule provided will be considered cause for rejection of the proposal. Modifications or additions to any portion of the proposal document may be cause for rejection of the proposal. The MDFA reserves the right to decide, on a case-by-case basis, whether to reject a proposal with modifications or additions as non-responsive.

7.2.9 Vendors taking exception to any part or section of the solicitation shall indicate such exceptions on the RFP Statement of Compliance and Exception(s) form, Attachment F. Failure to indicate any exception will be interpreted as the Vendor’s intent to comply fully with the requirements as written. Conditional or qualified proposals, unless specifically allowed, shall be subject to rejection in whole or in part. The proposal must contain a high degree of acceptance of contract terms and conditions listed in the draft contract provided as Attachment E of this RFP.

7.2.10 A proposal response that includes terms and conditions that do not conform to the terms and conditions in the proposal document is subject to rejection as non-responsive. The MDFA reserves the right to permit the Vendor to withdraw nonconforming terms and conditions from its proposal response prior to a determination by the MDFA of non-responsiveness based on the submission of nonconforming terms and conditions.

7.2.11 As a precondition to proposal acceptance, the MDFA may request the Vendor to withdraw or modify those portions of the proposal deemed non-responsive that do not affect quality, quantity, price, or delivery of the service.

7.2.12 Any vendor claiming that its response contains information exempt from the Mississippi Public Records Act (Miss. Code Ann. §§ 25-61-1 et seq. and 79-23-1), shall segregate and mark the information as confidential and provide the specific statutory authority for the exemption.

If the proposal contains confidential information, one (1) redacted electronic copy of the complete proposal including all attachments shall be submitted in a searchable Microsoft Office® format, preferably in Word® or Portable Document Format (PDF®).
If a redacted copy is not submitted, MDFA shall consider the entire Proposal to be public record. The redacted copy should identify which section or information has been redacted and the Vendor shall provide the specific statutory authority for the exemption. Per Mississippi Code Annotated § 25-61-9(7), the type of service to be provided, the price to be paid, and the term of the Contract cannot be deemed confidential.

The redacted copy shall be considered public record and immediately released, without notification to the Vendor, pursuant to any request under the Mississippi Public Records Act, Miss. Code Ann. §§ 25-61-1 et seq. and 79-23-1. Redacted copies shall also be used/released for any reason deemed necessary by MDFA, including but not limited to, submission to the PPRB, posting to the Transparency Mississippi website, etc.

**Section 8 – Bidder Certification**

The Vendor agrees that submission of a signed proposal, fee schedule, and BAFO (if requested), is certification that the Vendor will accept an award made to it as a result of the submission. Under no circumstances, shall the maximum time for proposal acceptance by the State extend beyond one (1) year from the date of opening.

**Section 9 – Debarment**

By submitting a proposal, the Vendor certifies that it is not currently debarred from submitting proposals for contracts issued by any political subdivision or agency of the State of Mississippi and that it is not an agent of a person or entity that is currently debarred from submitting proposals for contracts issued by any political subdivision or agency of the State of Mississippi.

**Section 10 – Registration with Mississippi Secretary of State**

By submitting a proposal, the Vendor certifies that it is registered to do business in the State of Mississippi as prescribed by Mississippi law and the Mississippi Secretary of State or, if not already registered, that it will do so within seven (7) business days of being notified by the MDFA that it has been selected for contract award. Sole proprietors are not required to register with the Mississippi Secretary of State.

**Section 11 – Insurance, Bonds, or Other Sureties**

11.1 The successful Vendor shall, at its own expense, obtain and maintain insurance, which shall include the following types and coverage limits:

11.1.1 **Workers Compensation** coverage as required by the State of Mississippi. The policy shall provide coverage for all states of operation that apply to the performance of scope of work.
11.1.2 **Comprehensive General or Commercial Liability** – at least $1,000,000.00 each occurrence to protect the property, goods and material of the MDFA while in the Vendor’s possession.

11.1.3 The Vendor is responsible for ensuring that any subcontractors provide adequate insurance and/or bond coverage for the activities arising out of subcontracts.

11.2 Additionally:

11.2.1 In no event shall the requirement for an insurance, bond, or other surety be waived.

11.2.2 All insurances policies will list the State of Mississippi as an additional insured.

11.2.3 All insurance policies shall be issued by companies authorized to do business under the laws of the State of Mississippi, meaning insurance carriers must be licensed or hold a Certificate of Authority from the Mississippi Department of Insurance.

11.2.4 Vendor shall not commence work under this Contract until it obtains all insurance and/or bond required under this provision and furnishes a certificate or other form showing proof of current coverage to the State. After work commences, the Vendor will keep in force all required insurance and/or bond until the Contract is terminated or expires.

11.2.5 Vendor shall submit renewal certificates as appropriate during the term of the Contract.

11.2.6 Vendor shall ensure that should any of the above described policies be cancelled before the expiration date thereof, or if there is a material change, potential exhaustion of aggregate limits or intent not to renew insurance and/or bond coverage(s), that written notice will be delivered to the MDFA.

11.2.7 There shall be no cancellation, material change, potential exhaustion of aggregate limits or non-renewal of insurance and/or bond coverage(s) to MDFA. Any failure to comply with the reporting provisions of this clause shall constitute a material breach of Contract and shall be grounds for immediate termination of this Contract by MDFA.

**Section 12 – Proposal Opening**

Submitted proposals shall be opened at the time/date designated in Section 2. The proposal opening is not open to the public.
Section 13 – Award Notification

Award for this procurement will be posted on the Mississippi Contract/Procurement Opportunity Search Portal website and the agency website at https://www.dfa.ms.gov/bid-rfp-notices/. Vendors will be notified via e-mail of the award.

Section 14 – Procurement Methodology

14.1 Restrictions on Communications with Agency and Agency Staff

At no time shall any vendor or its personnel contact, or attempt to contact, any MDFA staff regarding this RFP except the contact person as set forth and in the manner prescribed in Section 3.

14.2 Vendor Investigations

Before submitting a proposal, each vendor shall make all investigations and examinations necessary to ascertain all site conditions and requirements affecting the full performance of the Contract and to verify any representations made by the MDFA upon which the Vendor will rely. If the Vendor receives an award as a result of its proposal submission, failure to have made such investigations and examinations will in no way relieve the Vendor from its obligation to comply in every detail with all provisions and requirements of the Contract documents, nor will a plea of ignorance of such conditions and requirements be accepted as a basis for any claim whatsoever for additional compensation.

14.3 Expenses Incurred in Preparing a Proposal

The MDFA accepts no responsibility for any expense incurred by any vendor in the preparation and presentation of a proposal. Such expenses shall be borne exclusively by the Vendor.

14.4 Independent Price Determination

By submitting a proposal, the Vendor certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other vendor or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid/offered. The prices quoted shall be inclusive of, but not limited to the following: all required labor; all required equipment/material; all required insurance, bond, or other surety; all required overhead/profit; all required applicable taxes; all required vehicles; all required fuel and mileage; all required travel; all required labor and supervision; all required training; all required business and professional certifications,
licenses, permits, or fees; and, any and all other direct or indirect costs, incurred or to be incurred. All pricing should include all associated costs with no additional or hidden fees.

14.5 Rejection of Proposals

A proposal that includes terms and conditions that do not conform to the terms and conditions in the RFP document is subject to rejection as non-responsive. Further, submission of a proposal that is not complete and/or signed is subject to rejection as non-responsive. The MDFA reserves the right to permit the Vendor to withdraw nonconforming terms and conditions from its proposal prior to a determination by the MDFA staff of non-responsiveness based on the submission of nonconforming terms and conditions. Furthermore, if a vendor’s price is substantially higher or lower than those of other vendors, meaning those in excess or deficient of a twenty-five percent (25%) differential, the Vendor’s price will be deemed non-responsive.

14.6 Withdrawal of Proposals

If the price bid/offered is substantially lower than those of other vendors, a mistake may have been made. A vendor may withdraw its proposal from consideration if certain conditions are met:

(1) The proposal is submitted in good faith;
(2) The price bid/offered is substantially lower than those of other vendors because of a mistake;
(3) The mistake is a clerical error, not an error of judgment; and,
(4) Objective evidence drawn from original work papers, documents, and other materials used in the preparation of the proposal demonstrates clearly that the mistake was an unintentional error in arithmetic or an unintentional omission of a quantity of labor or material.

To withdraw a proposal that includes a clerical error after proposal opening, the Vendor must give notice in writing to the MDFA of claim of right to withdraw a proposal. Within two (2) business days after the proposal opening, the Vendor requesting withdrawal must provide to the MDFA all original work papers, documents, and other materials used in the preparation of the bid/offer.

A vendor may also withdraw a bid/offer, prior to the time set for the opening of proposals, by simply making a request in writing to the MDFA. No explanation is required.

No vendor who is permitted to withdraw a proposal shall, for compensation, supply any material or labor to or perform any subcontract or other work for the person to whom the Contract is awarded, or otherwise benefit from the Contract.

No partial withdrawals of a proposal are permitted after the time and date set for the proposal opening; only complete withdrawals are permitted.
14.7 Post-Award Vendor Debriefing

A vendor, successful or unsuccessful, may request a post-award vendor debriefing, in writing, by email (InsuranceRFP@dfa.ms.gov). Vendors should enter “RFP RFx Number 3120002222 – Debriefings” as the subject for the email. The written request must be received by the Alicia Coleman, MDFA OI Procurement Director, within three (3) business days of notification of the contract award. A post-award vendor debriefing is a meeting and not a hearing; therefore, legal representation is not required. A debriefing typically occurs within three (3) business days of receipt of the request. If a vendor prefers to have legal representation present, the Vendor must notify the Alicia Coleman, MDFA OI Procurement Director, in writing and identify its attorney by name, address, and telephone number. The MDFA will schedule and/or suspend and reschedule the meeting at a time when a Representative of the Office of the Mississippi Attorney General can be present.

For additional information regarding Post-Award Vendor Debriefing, as well as the information that may be provided and excluded, please see Section 6.210, Debriefing, of the State of Mississippi Procurement Manual as updated and replaced by PPRB.

14.8 Protests

Any actual or prospective offeror who is aggrieved in connection with this solicitation or the outcome of this RFP may file a protest with Alicia Coleman, MDFA OI Procurement Director. The protest shall be submitted within seven (7) calendar days of notification of the contract award or on or before 5:00 PM CST, July 30, 2021, in writing after such aggrieved person or entity knows or should have known of the facts giving rise thereto. The written protest letter shall contain an explanation of the specific basis for the protest. All protests must be in writing, dated, signed by the Vendor or an individual authorized to sign contracts on behalf of the protesting vendor, and contain a statement of the reason(s) for protest, citing the law(s), rule(s) and regulation(s) or procedure(s) on which the protest is based. The protesting vendor must provide facts and evidence to support the protest. A protest is considered filed when received by Alicia Coleman, MDFA OI Procurement Director, via either U.S. mail, postage prepaid, or by personal delivery. Protests filed after 5:00 PM CST, July 30, 2021, will not be considered.

Section 15 – Required Contract Terms and Conditions

A draft contract has been included as Attachment E to this RFP for your review and comment. Any contract entered into with the MDFA pursuant to this RFP shall have the clauses in italic blue type as these are required pursuant to the PPRB OPSCR Rules and Regulations and/or State of Mississippi Procurement Manual as updated and replaced by PPRB. These required clauses are mandatory and are nonnegotiable.
MDFA discourages exceptions from the draft contract content, regardless of content being required or not. Such exceptions may cause a proposal to be rejected as non-responsive. Proposals which condition the proposal based upon the State accepting other terms and conditions not found in the RFP, or which take exception to the State’s terms and conditions, may be found non-responsive, and no further consideration of the proposal will be given.

**Section 16 – Agency Website**

This RFP, any amendment thereto, such as Questions and Answer document(s) and Summary of Pre-Proposal Conference, Tour, or Site Visit, if any were issued, the Notice of Intent To Award, and the Evaluation Report will be posted on the agency website at [https://www.dfa.ms.gov/bid-rfp-notices/](https://www.dfa.ms.gov/bid-rfp-notices/) and on the Mississippi Contract/Procurement Opportunity Search Portal website.

**Section 17 – Attachments**

The attachments to this RFP are made a part of this RFP as if copied herein in words and figures.
Proposals are to be submitted as listed below, on or before 1:00 PM CST, July 16, 2021.

PLEASE MARK YOUR ENVELOPE:

RFP for Design, Print, and Direct Mail Services
RFP RFx Number 3120002222
Opening Date: 1:30 PM CST, July 16, 2021
Mississippi Department of Finance & Administration, Office of Insurance
Attention: Alicia Coleman, MDFA OI Procurement Director
P.O. Box 24208 (Mailing Address)
Jackson, Mississippi 39225-4208
501 North West Street, Suite 901-B Woolfolk Building (Hand Delivery Address)
Jackson, Mississippi 39201
SEALED PROPOSAL – DO NOT OPEN

Name of Company: ______________________________________________________________

Proposal By: ________________________________________________________________

Signature: ________________________________________________________________

Address: _________________________________________________________________

City/State/Zip: _____________________________________________________________

Telephone: _______________________________________________________________

Fax Number: _______________________________________________________________

E-Mail Address: _____________________________________________________________

Name, title, phone number, and email address of Company Representative to be contacted by
MDFA, if different than person identified above: ______________________________

In addition to providing the above contact information, please answer the following questions
regarding your company:

1. What month and year was your company started/established?
2. How many years has your company been in the business of performing the services called for in this RFP?
   a. Design and print services
   b. Direct mail services
3. Please provide the physical location and mailing address of your company’s home office, principal place of business, and place of incorporation.
4. If your company is not physically located within the vicinity, how will you supply the services required in this RFP to the MDFA?
5. List the office that will service the MDFA OI. If it is located at a different address than the home office, provide the complete address, phone number, and facsimile number for this office.
6. Is your company licensed and/or certified to provide the services required in this RFP and as required by any and all applicable Federal and State law(s)?
7. List all licenses or permits your company possesses that are applicable to performing the services required in this RFP.
8. Describe any specific services which your company offers along with your organization’s accreditation or service/quality ratings, including year obtained and certification duration, if applicable, or any specialized experience, certification, and/or education of your current staff.
9. What was the average number of employees of your company during calendar year 2020? Please list the net change in the number of employees in your company from June 2018 to June 2021, with explanation if change is significant.
10. For how many customers has your company provided the equivalent or similar services in requirements and scale to those services described in this RFP for in the past four (4) years?
11. What is the largest customer your company has provided the equivalent or similar services in requirements and scale to those services described in this RFP for in the past four (4) years?
12. Provide a brief description of any outside vendors or subcontractors that will be involved in providing key services detailed within your proposal. Please include the term of your current contract with each vendor or subcontractor. Describe the nature of the relationship with the subcontractor, including any ownership interest.
13. Has your company ever been involved in a lawsuit involving any area covered by this RFP? If yes, provide details including dates and outcomes.
14. During the past four (4) years, has your company, related entities, principals or officers ever been a party in any material criminal litigation, whether directly related to this RFP or not? If yes, provide details including dates and outcomes.
15. Has your company been cited or threatened with citation within the last four (4) years by federal or state regulators for violations of any federal, state, or local law or federal, state or local regulation? If yes, please describe the circumstances in detail.
16. Has your company had any HIPAA breaches or incidents determined to be reportable to the U.S. Department of Health and Human Services (DHHS) within the last four (4) years? If yes, please describe the circumstances and the corrective action in detail.
17. Confirm that your company is not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transaction by any federal department or agency, or by any political subdivision or agency of the State of Mississippi.
18. Describe your organizational structure. Indicate whether your company operates as a corporation, partnership, individual, etc. If incorporated, include the state in which it is incorporated, and list the names and occupations of those individuals serving on your company’s Board of Directors.

19. List the name and principal occupation or business of any person or entity owning five percent (5%) or more of your company.

20. Provide the names of any organizations of which you own or control five percent (5%) or more of.

21. State if the proposed account executive, any officers or principals and/or their immediate families are, or have been within the preceding twelve months, employees of the State of Mississippi.

22. Is your company currently for sale or involved in any transaction to expand or to become acquired by another business entity? If yes, please discuss the impact both in organizational and directional terms.

23. Describe any ownership or name changes your company has been through in the past four (4) years. Are any ownership or name changes planned?

24. Describe any changes in the organizational structure that have occurred within your company over the past two (2) years or are anticipated during the next two (2) years including, but not limited to, addition or elimination of product or business lines, mergers, acquisitions, etc.

25. Please confirm the proposal is valid for at least one (1) year subsequent to the date of submission.

26. List up to three clients for whom your company has provided the equivalent or similar services in requirements and scale to those services described in this RFP. For each client, specify the type of direct mail, printing and design services provided by your company, the number of covered lives in the client’s group, and the period of time retained as a client. One of the three must be the longest standing client and one must be the client with the largest employee population. For each client, the list must specify:
   a. Client name, include the name, title, address, e-mail address, and phone number of a person whom we may contact to confirm as needed,
   b. The type of work your company provided to the client,
   c. The number of covered lives in the client’s group,
   d. Contract effective dates for the time period(s) (beginning and end dates) your company provided services to the client.

27. List up to three governmental clients for whom your company has provided one or more of the services requested in this Request for Quotes. If possible, please list three additional clients besides any previously listed references. For each client, specify the type of work performed by your company, the number of covered lives in the client’s group, and the period of time retained as a client. For each client, the list must specify:
   a. Client name, include the name, title, address, e-mail address, and phone number of a person whom we may contact to confirm as needed,
   b. The type of work your company provided to the client,
   c. The number of covered lives in the client’s group,
   d. Contract effective dates for the time period(s) (beginning and end dates) your company provided services to the client.
28. List all clients that have discontinued use of your services in the past four years and your understanding of their discontinued use of your services. For each client, the list must specify:
   a. Client name, include the name, title, address, e-mail address, and phone number of a person whom we may contact to confirm as needed,
   b. The type of work your company provided to the client,
   c. The number of covered lives in the client’s group,
   d. Contract effective dates for the time period(s) (beginning and end dates) your company provided services to the client.
   e. Reason discontinued
Attachment B

FEE SCHEDULE

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<th>Company</th>
<th>Contact Person</th>
<th>Telephone Number</th>
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The pricing quoted shall be inclusive of, but not limited to, the following:
1. All required equipment/material(s);
2. All required insurance, bond, or other surety;
3. All required overhead/profit;
4. All required applicable taxes;
5. All required vehicles;
6. All required fuel and mileage;
7. All required travel;
8. All required labor and supervision;
9. All required training;
10. All required business and professional certifications, licenses, permits, or fees; and,
11. Any and all other direct or indirect costs, incurred or to be incurred.

All pricing for Design, Print, and Direct Mail Services should include all associated costs for the items with no additional or hidden fees, based on the estimated quantities provided. **Fees should include all charges associated with the project.** In addition, Vendors should provide a rate(s) per 1,000, with any minimum flat fees that may apply. All prices must be guaranteed for the potential five-year term of the Contract.

All newsletters must on 80 lb. gloss text paper; Letters must be on 60 lb. offset letter in #10 24 lb. envelope; Post cards must be on 100 lb. matte finish; Plan Document must be on 20 lb. bond paper for inside pages and 80 lb. uncoated cover with perfect bound/binding spine.

For each service you can provide, please indicate the cost below. If your company is currently unable to provide a listed service, respond by stating, “**Unable to provide this service**”.

**Design and Print Fee:** Indicate in the chart below all-inclusive fees for all design and print costs associated with the projects listed. Recycled paper products should be used unless otherwise specified.

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<th>Year 3</th>
<th>Year 4</th>
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<td>Document Tabbing Per M</td>
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<td>Document Insertion in #10 Per M</td>
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<td>Other:</td>
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</tbody>
</table>

**Direct Mail Services:** Indicate in the chart below an all-inclusive fee, including but not limited to, folding, tabbing and insertion of the publication, receiving and processing address file and printed material (to be mailed), CASS certification, mail sort(s), label creation/affixing to document, and delivery to an appropriate United States Postal Service postal facility for the services indicated.
<table>
<thead>
<tr>
<th>Service Description</th>
<th>Price Per M</th>
<th>Quantity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>6-Page, 4-Color Newsletter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4-Page, 2-Color Newsletter Project</td>
<td>137,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6-Page, 2-Color Newsletter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Document Booklet – Price per M</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approximately 100 printed pages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Processing return requests for Plan Document Booklet</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post Card Project – 137,000</td>
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<tr>
<td>Post Card – Price per M</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Letter Project – 137,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Letter – Price per M</td>
<td></td>
<td></td>
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<tr>
<td>Graphic Design Services (per hour)</td>
<td></td>
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<tr>
<td>Data Processing/File Download Per M</td>
<td></td>
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<tr>
<td>Standard Mail Sort Per M</td>
<td></td>
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<tr>
<td>Addressing: Cheshire Per M</td>
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<tr>
<td>Addressing: PSL Per M</td>
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<tr>
<td>Addressing: Laser Sheet Per M</td>
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<tr>
<td>Addressing: Ink Jet Per M</td>
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<tr>
<td>Addressing: Other (Specify) Per M</td>
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<tr>
<td>Document Folding: 8.5x11 in #10 Per M</td>
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<td>Document Folding: 11x14 in #10 Per M</td>
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<td>Document Tabbing Per M</td>
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<td>Document Insertion in #10 Per M</td>
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<tr>
<td>Other:</td>
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</tbody>
</table>

By signing below, the company Representative certifies that he/she has authority to bind the company, and further acknowledges and certifies on behalf of the company:

1. That he/she has thoroughly read and understands the Request for Proposals and Attachments thereto;
2. That the company meets all requirements and acknowledges all certifications contained in the Request for Proposals and Attachments thereto;
3. That the company agrees to all provisions of the Request for Proposals and Attachments thereto including, but not limited to, the Required and Optional Clauses provided in the attached draft contract (Attachment E);
4. That the company will perform the services required at the prices quoted above;
5. That, to the best of its knowledge and belief, the cost or pricing data submitted is accurate, complete, and current as of the submission date;

6. The Vendor represents that its workers are licensed, certified and possess the requisite credentials to Design, Print, and Direct Mail Services; and,

7. **NON-DEBARMENT:** By submitting a proposal, the Vendor certifies that it is not currently debarred from submitting proposals for contracts issued by any political subdivision or agency of the State of Mississippi and that it is not an agent of a person or entity that is currently debarred from submitting proposals for contracts issued by any political subdivision or agency of the State of Mississippi.

8. **INDEPENDENT PRICE DETERMINATION:** The Vendor certifies that the prices submitted in response to the solicitation have been arrived at independently and without, for the purpose of restricting competition, any consultation, communication, or agreement with any other vendor or competitor relating to those prices, the intention to submit a proposal, or the methods or factors used to calculate the prices bid/offered.

9. **PROSPECTIVE VENDOR’S REPRESENTATION REGARDING CONTINGENT FEES:** The prospective vendor represents as a part of such Vendor’s proposal that such Vendor *has not* retained any person or agency on a percentage, commission, or other contingent arrangement to secure this Contract.

10. **REPRESENTATION REGARDING CONTINGENT FEES:** Vendor represents that it *has not* retained a person to solicit or secure a State contract upon an agreement or understanding for a commission, percentage, brokerage, or other contingent fee, except as disclosed in the Vendor’s proposal.

11. **REPRESENTATION REGARDING GRATUITIES:** Vendor represents that it *has not* violated, is not violating, and promises that it will not violate the prohibition against gratuities set forth in Section 9.105 (Gratuities) of the *State of Mississippi Procurement Manual*.

Company Name: 

Printed Name of Representative: 

Date: 

Signature: 

**Note:** Failure to sign the fee schedule may result in the proposal being rejected as non-responsive. Modifications or additions to any portion of this proposal document may be cause for rejection of the proposal.
Attachment C

REFERENCES

Vendor may submit as many references as desired by submitting as many additional copies of Attachment C, References, as deemed necessary. References will be contacted in order listed until two references have been interviewed and Reference Score Sheets completed for each of the two references. No further references will be contacted; however, vendors are encouraged to submit additional references to ensure that at least two references are available for interview. MDFA staff must be able to contact two references within two (2) business days of proposal opening to be considered responsive or no later than July 21, 2021.

REFERENCE 1
Name of Company: ____________________________________________________________
Dates of Service: _____________________________________________________________
Contact Person: ______________________________________________________________
Address: ___________________________________________________________________
City/State/Zip: _________________________________________________________________
Telephone Number: ___________________________________________________________
Cell Number: __________________________________________________________________
E-mail: _____________________________________________________________________
Alternative Contact Person (optional): _____________________________________________
Telephone Number: ___________________________________________________________
Cell Number: __________________________________________________________________
E-mail: _____________________________________________________________________

REFERENCE 2
Name of Company: ____________________________________________________________
Dates of Service: _____________________________________________________________
Contact Person: ______________________________________________________________
Address: ___________________________________________________________________
City/State/Zip: _________________________________________________________________
Telephone Number: ___________________________________________________________
Cell Number: __________________________________________________________________
E-mail: _____________________________________________________________________
Alternative Contact Person (optional): _____________________________________________
Telephone Number: ___________________________________________________________
Cell Number: __________________________________________________________________
E-mail: _____________________________________________________________________
<table>
<thead>
<tr>
<th>Reference 3</th>
<th>Name of Company: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Dates of Service: ______________________________</td>
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<tr>
<td></td>
<td>Contact Person: _________________________________</td>
</tr>
<tr>
<td></td>
<td>Address: ________________________________________</td>
</tr>
<tr>
<td></td>
<td>City/State/Zip: _________________________________</td>
</tr>
<tr>
<td></td>
<td>Telephone Number: ______________________________</td>
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<td>Cell Number: ___________________________________</td>
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<td>E-mail: _________________________________________</td>
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<td></td>
<td>Alternative Contact Person (optional): ___________</td>
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<tr>
<td></td>
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<td></td>
<td>Cell Number: ___________________________________</td>
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<tr>
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<td>E-mail: _________________________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reference 4</th>
<th>Name of Company: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dates of Service: ______________________________</td>
</tr>
<tr>
<td></td>
<td>Contact Person: _________________________________</td>
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<tr>
<td></td>
<td>Address: ________________________________________</td>
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<tr>
<td></td>
<td>City/State/Zip: _________________________________</td>
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<tr>
<td></td>
<td>Telephone Number: ______________________________</td>
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<td></td>
<td>Cell Number: ___________________________________</td>
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<td></td>
<td>E-mail: _________________________________________</td>
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<tr>
<td></td>
<td>Alternative Contact Person (optional): ___________</td>
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<td>Telephone Number: ______________________________</td>
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<td>Cell Number: ___________________________________</td>
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</table>

<table>
<thead>
<tr>
<th>Reference 5</th>
<th>Name of Company: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dates of Service: ______________________________</td>
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<tr>
<td></td>
<td>Contact Person: _________________________________</td>
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<td></td>
<td>Address: ________________________________________</td>
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<td></td>
<td>City/State/Zip: _________________________________</td>
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<td></td>
<td>Telephone Number: ______________________________</td>
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<td>Alternative Contact Person (optional): ___________</td>
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<td>Cell Number: ___________________________________</td>
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<td></td>
<td>E-mail: _________________________________________</td>
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</tbody>
</table>
Attachment D

References Score Sheet

TO BE COMPLETED BY MDFA STAFF ONLY

Company Name: ________________________________________________________________

Reference Name: ________________________________________________________________

Person Contacted, Title/Position: __________________________________________________

Date/Time Contacted: ____________________________________________________________

Service From/To Dates: ____________________________________________________________

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to provide Design, Print, and Direct Mail services when you called?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfied with the Design, Print, and Direct Mail services provided? If no, please explain.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor easy to work with in scheduling Design, Print, and Direct Mail services?</td>
<td></td>
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<tr>
<td>Was the Design, Print, and Direct Mail services completed on time and within budget?</td>
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<tr>
<td>Vendor listened when you had an issue and readily offered a solution? (If never had an issue, please check here ____.)</td>
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<tr>
<td>Would you enter into a contract with them again?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Would you recommend them?</td>
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<td></td>
</tr>
</tbody>
</table>

Bidder must have a minimum of 6 “yes” answers on the questions above from two references (total of 12 “yes” answers) to be considered responsible and for its bid to be considered.

Score: Pass/Fail

Do you have any business, professional or personal interest in the Vendor’s organization? If yes, please explain. | Yes | No |

A “yes” to the above question may result in an automatic disqualification of the provided reference; therefore, resulting in a score of zero as responses to previous questions become null and void.

Notes: ______________________________________________________________________________________

_________________________________________________________________________________________

Called by: ____________________________________________________________

Signature__________________________________________________________________________Title________________________Date__

Design, Print, and Direct Mail Services RFP # 3120002222
Vendor taking exception to any part or section of the solicitation shall indicate such exceptions on the table below. If no exceptions are taken, then the Vendor shall state in this section “No Exceptions Taken.” Failure to indicate any exception will be interpreted as the Vendor’s intent to comply fully with the requirements as written. Conditional or qualified proposals, unless specifically allowed, shall be subject to rejection in whole or in part.

We agree to adhere to all terms, conditions, and requirements as set forth in the *MDFA OI’s Request for Proposal for Design, Print, and Direct Mail Services*, dated June 16, 2021, including all RFP attachments and amendments, except as listed below.

<table>
<thead>
<tr>
<th>Procurement Section and Page Number</th>
<th>Original Language</th>
<th>Requested Change/Exception</th>
<th>MDFA Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<tr>
<td>2.</td>
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<tr>
<td>3.</td>
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<td>4.</td>
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<td>5.</td>
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</tr>
</tbody>
</table>

An original signature is required below. This statement must be signed by an appropriate Vendor officer and returned as part of your proposal.

**Company Name:**

**Printed Name of Representative, Title:**

**Date:**

**Signature:**

**Note:** Failure to sign this form may result in the proposal being rejected as non-responsive. Modifications or additions to any portion of this proposal document may be cause for rejection of the proposal.