

**City and County of San Francisco**  
**Sourcing Event ID 0000005209 | Dept Contract ID: UASI 20-06**

**Formal Invitation for Bids for:  
 Remote Ballot Completion and Submission for  
 People with Access and Functional Needs**

This Solicitation can be viewed under at City’s Supplier Portal: <https://sfcitypartner.sfgov.org/pages/index.aspx>



Request for Proposals Issuance	Friday, April 2, 2021; 12:00 PM PDT
Deadline for Questions	Wednesday, April 7, 2021; 5:00 PM PDT
Deadline to Submit Proposals	Wednesday, April 28, 2021; 2:00 PM PDT
Notice of Intent to Award	Monday, May 24, 2021; 5:00 PM PDT
Period for Protesting Notice of Intent to Award	Within (3) three business days of the City's issuance of a Notice of Intent to Award.
Contract Administrator:	Scott Kaplan Contract Specialist, Bay Area UASI 711 Van Ness, San Francisco, CA, 94102 Email: uasicontracts@sfgov.org

**Solicitation Attachments:**

- Attachment 1: City’s Proposed Agreement Terms (P-649)
- Attachment 2: Reserved. (Price Proposal Template)
- Attachment 3: Proposer Questionnaire
- Attachment 4: Proposer Information and References
- Attachment 5: First Source Hiring Form
- Attachment 6: Health Care Accountability Ordinance & Minimum Compensation Ordinance Forms
- Attachment 7: Reserved (Sweatfree Ordinance Form P-12U-C)
- Attachment 8: Reserved (Sweatfree Ordinance Form P-12U-I)
- Attachment 9: CMD Form 3
- Attachment 10: Reserved (LBE Participation Requirements and Good Faith Outreach Forms)
- Attachment 11: Proposal Statement Form

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## **I. INTRODUCTION AND SOLICITATION SCHEDULE**

### **A. Introduction**

#### **1. General**

This Request for Proposals (hereinafter “Solicitation”) is being issued by the Department of Emergency Management, Bay Area UASI Management Team (“DEM”). DEM is seeking qualified suppliers (“Proposers”) to provide proposals for a Cybersecurity Identity Access Management (IAM) solution to enhance remote ballot completion and submission for people with access and functional needs (Proposal). DEM shall order goods and/or services covered by the awarded contract through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract during the contract term.

#### **2. Selection Overview**

City shall award a contract to the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the highest-ranking score.

### **B. Anticipated Contract Term**

A contract awarded pursuant to this Solicitation shall be non-exclusive with an original term of two years. The City at its sole, absolute discretion, shall have the option to extend the term for one additional years for a total of three years.

### **C. Anticipated Contract Not to Exceed Amount**

A contract awarded pursuant to this Solicitation shall have a not to exceed (“NTE”) amount of \$1,500,000 for the initial term. Should the contract be extended, the NTE may proportionally increase as well.

### **D. Reserved (Indefinite Quantity, As Needed Contract)**

### **E. Cooperative Agreement**

Any other City department, public entity and non-profit made up of multiple public entities, may use this solicitation to obtain some or all of the commodities or services to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation.

### **F. Limitation on Communications During Solicitation**

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer’s control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee - is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

### **G. Solicitation Schedule**

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other pertinent information posted in the City’s Supplier Portal.

<b>Proposal Phase</b>	<b>Tentative Date</b>
Request for Proposals Issued	Friday, April 2, 2021; 12:00 PM PDT
Deadline for Written Questions	Wednesday, April 7, 2021; 5:00 PM PDT

Deadline to Submit Proposals	Wednesday, April 28, 2021; 2:00 PM PDT
Notice of Intent to Award	Monday, May 24, 2021; 5:00 PM PDT
Period for Protesting Notice of Intent to Award	Within (3) three business days of the City's issuance of a Notice of Intent to Award.
Final Award	Thursday, May 27, 2021; 5:00 PM PDT

## H. How to Register as a City Supplier

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

**Step 1:** Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

**Step 2:** Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and 12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **Chapter 12(B) and 12(C) Inquiries:** For questions concerning the City's Chapter 12(B) and 12(C) Equal Benefits and Non-Discrimination in Contracting requirements, go to: [www.sfgov.org/cmd](http://www.sfgov.org/cmd).

## I. Proposal Questions and Submissions

### 1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation no later than the deadline for submission of written questions or requests for clarification.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>.

### 2. Proposal Format

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at least .5" on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

### 3. Time and Place for Submission of Proposals

Prior to the Proposal submission deadline, Proposers must email their proposals to [uasicontracts@sfgov.org](mailto:uasicontracts@sfgov.org). Proposals must be received no later than 2:00 PM PDT. Sent times will not be considered, please allow for time to send large emails to ensure the proposal is received by

the deadline. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

#### **J. Proposal Selection**

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

#### **K. Contract Terms and Negotiations**

The successful Proposer will be required to enter into the Agreement attached hereto as Attachment 1, City's Proposed Agreement Terms. The Proposed Agreement Terms are not subject to negotiation. Failure to timely execute the Proposed Agreement, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the Proposed Agreement, shall be deemed an abandonment of the Proposal and City, in its sole discretion, may select another Proposer and proceed against the original selectee for damages.

#### **L. Protest Procedures**

##### **1. Protest of Non-Responsiveness Determination**

Within (3) three business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

##### **2. Protest of Non-Responsible Determination**

Within (3) three business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

##### **3. Protest of Contract Award**

Within (3) three business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

##### **4. Delivery of Protests**

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will

objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

## **II. CITY'S SOCIAL POLICY REQUIREMENTS**

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social Policy Requirements"). These Social Policy Requirements can be found in Attachment 1, City's Proposed Agreement Terms. The Social Policy Requirements set forth below are NOT intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it. Proposers are encouraged to carefully review the Social Policy Requirements applicable to this Solicitation contained in Attachment 1, City's Proposed Agreement Terms.

### **A. Proposers Unable to do Business with the City**

#### **1. Generally**

Proposers that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below and in Attachment 1, City's Proposed Agreement Terms.

#### **2. Administrative Code Chapter 12X**

Subject to certain exceptions, Proposers are advised that this Solicitation is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into a contract with a Proposer that (a) has its headquarters in a state that has enacted a law that perpetuates discrimination against LGBT people and/or has enacted a law that prohibits abortion prior to the viability of the fetus, or (b) will perform any or all of the work on the contract in such a state. Chapter 12X requires the City Administrator to maintain a list of such states, defined as "Covered States" under Administrative Code Sections 12X.2 and 12X.12. The list of Covered States is available on the website of the City Administrator (<https://sfgsa.org/chapter-12x-state-ban-list>). Proposers will be required to certify compliance with Chapter 12X as part of its Proposal, unless the City determines that a statutory exception applies. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

#### **3. Administrative Code Chapter 12B**

A Proposer selected pursuant to this Solicitation may not, during the term of the Agreement, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in §12B.2(b) of the San Francisco Administrative Code. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

**B. Reserved (Prevailing Wage Ordinance)**

**C. Health Care Accountability Ordinance**

A Proposer selected pursuant to this Solicitation shall comply with the requirements of Chapter 12Q. For each Covered Employee, an awarded Proposer shall provide the appropriate health benefit set forth in Section 12Q.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Chapter 12Q and the Health Commission’s minimum standards available at <http://sfgov.org/olse/hcao>. Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

**D. Minimum Compensation Ordinance**

A Proposer selected pursuant to this Solicitation shall comply with Administrative Code Chapter 12P. A Proposer selected pursuant to this Solicitation shall pay covered employees no less than the minimum compensation required by San Francisco Administrative Code Chapter 12P, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Chapter 12P. Information about and the text of the Chapter 12P is available on the web at <http://sfgov.org/olse/mco>. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

**E. First Source Hiring Program**

A Proposer selected pursuant to this Solicitation shall comply with all of the provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code that apply to this Agreement and an awarded Proposer is subject to the enforcement and penalty provisions in Chapter 83. *Refer to Attachment 1, City Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

**F. Reserved (LBE Rating Bonus and Bid Discounts)**

**G. Reserved (LBE Subcontracting Requirements and Good Faith Outreach)**

**H. Reserved (Sweatfree Procurement)**

**I. Other Social Policy Provisions**

Attachment 1, City’s Proposed Agreement Terms, identifies the City’s applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

**III. GOODS AND SERVICES REQUESTED**

**A. Goods and/or Services Requested**

This Solicitation is being issued by DEM Bay Area UASI Management Team. DEM Bay Area UASI Management Team is seeking qualified suppliers (“Proposers”) to provide a Cybersecurity solution to enhance remote ballot completion and submission for people with access and functional needs. The services being procured through this Solicitation are set forth below.



The selected vendor will provide expertise and staff to support the development and implementation of software tools to enable residents with disabilities throughout the Bay Area region to vote from home. The development and implementation will integrate local government technology department guidance, as needed, and includes:

- Identity and Access Management (IAM). Using San Francisco or other Bay Area jurisdiction owned IAM technology to analyze, architect and build a modular solution to provide accessible and secure remote ballot completion and submission services to people with access and functional needs (AFN) throughout the Bay Area.
- Integration of AFN technologies. Using commercial AFN technologies and web forms systems, architect, design and prototype an integrated platform for use of AFN tools for filling in and completing a ballot without assistance from others. This innovative project will enable secure identity verification, the use of provable encryption for digital signing, and guaranteed secure transmission of ballots from voters with AFN to the elections departments where they will ultimately be printed and counted.

The scope of work may include but is not limited to the following:

- Support an assessment across the Bay Area Urban Area identifying in each jurisdiction the key players, voting platforms, and individual voting system needs related to accessible voting solutions for people with access and functional needs.
- Research and create modular solution design and architecture (including research in custom software and commercial licenses) to provide guaranteed, safe, and secure remote ballot completion and submission services; Product must interface with common 3<sup>rd</sup> party “assistive” devices for marking and viewing documents; Product must include enhanced sender/secure identity verification able to support San Francisco and other UASI counties’ IAM software technology, and provable encryption for digital signing.
- Under the direction of UASI project manager and San Francisco Department of Technology, and in collaboration with the San Francisco Elections Department, engage with California Secretary of State to build governance and consensus.
- Once system architecture, tool set, and design are approved by the UASI project manager and San Francisco Department of Technology, deliver initial solution, service, or technology and test with AFN voters and election staff in the UASI region.
- Design, build, and test a modular internet-based solution for a pilot subset of AFN voters, (with a goal of at least 1000 participants) in the region to:
  - Eliminate the need for AFN voters to print and fax ballots
  - Electronically prove the identity of each AFN voter
  - Electronically verify the identity of each AFN voter
  - Electronically sign the ballot
  - Electronically submit the ballot to a county Election Department
  - Ensure non-repudiation of the ballot submission
- Under the direction of UASI project manager and local government technology department, manage adoption, implementation, and deployment of this modular solution for the region.
- Under the direction of UASI project manager and local government technology department, conduct solution training on the use of technology for IT staff and elections officials.

- At the end of the project, contribute to a detailed after-action or improvement plan on the effectiveness of IAM technology post voting episode for each jurisdiction and recommendations for next steps.
- Additional deliverables in collaboration with the local government implementation team may include:
  - Project workplan and schedule which will be approved by the UASI project manager before work begins.
  - Monthly reports and a quarterly summary report on progress, completion and next work objectives.
  - Regular team meetings with the City and Proposer to review project work and provide feedback.
  - System architecture document including description of the software components.
  - System requirements document that describes the functionality, capability and use case for the system and a change management process for unplanned tasks.
  - User interface design document.
  - Experienced software development team and a technical project manager who will be responsible for communications, problem resolution and cost and schedule control.
  - Software and system technology that meet the user requirements and is free of defects.
  - Defect tracking for resolution of “bugs”, software mishandling, or discrepancies between the built software and requirements.
  - User acceptance and test document for the system.
  - Training materials, train the trainer workshop and documentation for the completed system.
  - Payment for system development will be based on the completion and acceptance of defined project milestones and deliverables defined in the workplan.

**B. Regulatory and Compliance Requirements Specific to the Goods/Services Solicited**

Prior to submitting a Proposal in response to this Solicitation, Proposers must ensure they have fully read and understood the “Regulatory and Compliance Requirements” set forth in Attachment 1, Appendix C: Grant Terms Contract Provisions for Non-Federal Entity Contracts under Federal Awards.

**C. Reserved (Articles Furnished)**

**D. Reserved (Alternates)**

**E. Reserved (Samples)**

**F. Reserved (Freight on Board)**

**G. Green Purchasing Requirements**

In preparation for any Proposal submitted in response to this Solicitation, Proposers are required to review the City Mandatory Green Purchasing Requirements to ensure all goods and services offered to City in response to this Solicitation comply with the City’s Green Purchasing Requirements. In addition, Proposers are encouraged to refer to Attachment 1, City’s Proposed Agreement Terms, for additional details related to the Green Purchasing Requirements applicable to any contract awarded pursuant to this Solicitation.

#### IV. PROPOSAL EVALUATION CRITERIA

Evaluation Phase	Maximum Points
Minimum Qualifications Documentation	Pass/Fail
Price Proposal	10 Points
Written Proposal	90 Points
<b>TOTAL POINTS</b>	<b>100</b>

Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined in the table above, each of which is addressed in more detail herein. If applicable, a CMD Contract Compliance Officer will assess Proposal compliance with LBE requirements and assign a rating bonus to Proposal scores. The CMD-adjusted scores (if applicable) will then be tabulated, and Proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the Proposer receiving the second highest score, and so on. Award shall be made to the Proposer with the highest Total Points.

#### V. REQUIRED SUPPORTING DOCUMENTATION

Proposers must provide each Required Supporting Documentation (“RSD”) identified below with their Proposal. Failure to do so may result in the Proposal being deemed Non Responsive.

<b>RSD1</b>	Evidence that Proposer is 12B compliant or likely to become compliant within 30 days.
<b>RSD2</b>	<p><b>Completed Proposal Attachments:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> San Francisco Business Tax Certificate or evidence of exemption</li> <li><input type="checkbox"/> Signed copy of all Proposal Addenda (If applicable)</li> <li><input type="checkbox"/> Attachment 1: City’s Proposed Agreement Terms Marked to with Proposer’s Proposed Changes</li> <li><input type="checkbox"/> Attachment 2: Reserved. (Price Proposal Template)</li> <li><input type="checkbox"/> Attachment 3: Proposer Questionnaire</li> <li><input type="checkbox"/> Attachment 4: Proposer Information and References</li> <li><input type="checkbox"/> Attachment 5: First Source Hiring Form</li> <li><input type="checkbox"/> Attachment 6: Health Care Accountability Ordinance &amp; Minimum Compensation Ordinance Forms</li> <li><input type="checkbox"/> Attachment 7: Reserved. (Sweatfree Ordinance Form P-12U-C)</li> <li><input type="checkbox"/> Attachment 8: Reserved. (Sweatfree Ordinance Form P-12U-I)</li> <li><input type="checkbox"/> Attachment 9: CMD Form 3</li> <li><input type="checkbox"/> Attachment 10: Reserved. (LBE Participation Requirements and Good Faith Outreach Forms)</li> <li><input type="checkbox"/> Attachment 11: Proposal Statement Form</li> </ul>
<b>RSD3</b>	<p><b>Non Profit Entities:</b> If a Proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the Proposer must comply with Chapter 12L and include in its Proposal:</p> <p>(1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to Proposer’s meetings and records, and</p> <p>(2) a summary and disposition of all complaints concerning the Proposer’s compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. If no such complaints were filed, the Proposer shall include a statement to that effect.</p>

	<i>Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer's Chapter 12L submissions shall be grounds for rejection of the Proposal and/or termination of any subsequent Agreement reached on the basis of the Proposal.</i>
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**VI. MINIMUM QUALIFICATIONS DOCUMENTATION (PASS/FAIL)**

Proposers must provide documentation that clearly demonstrates each Minimum Qualification (MQ) listed below has been met. Minimum Qualification documentation should be clearly marked as “MQ1”, MQ2”, etc.... to indicate which MQ it supports. Each Proposal will be reviewed for initial determination on whether Proposer meets the MQs referenced in this section. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

<b>MQ #</b>	<b>Description</b>
<b>MQ1</b>	Evidence that Proposer has five (5) years of experience within the last seven (7) years providing services described in this Service Area.
<b>MQ2</b>	Prior development and implementation experience with IAM technology.
<b>MQ3</b>	Prior engagement with identity verification services and deep understanding of identity verification integration with IAM technologies.
<b>MQ4</b>	Experience with digital accessibility tools and system integration.
<b>MQ5</b>	Prior engagement with immutable records technology of digital signature and digital record submission and integration of the technology with IAM.
<b>MQ6</b>	In depth knowledge of NIST Standards and guidelines, specifically, NIST 800-63-2/3 digital identity guidelines.
<b>MQ7</b>	In depth knowledge of Public Key Infrastructure (PKI), including the ability to create and manage key stores and certificates
<b>MQ8</b>	In depth knowledge of open authentication standards including Security Assertion Markup Language (SAML), OpenID Connect (OIDC), and OAuth
<b>MQ9</b>	In depth knowledge and implementation experience in SOAP and REST protocols
<b>MQ10</b>	Experience in developing complex applications with open-source like SpringBoot, Spring MVC, Spring Core, Thyme or in similar framework
<b>MQ11</b>	Experience in developing web and mobile applications with technologies and frameworks like HTML 5.0, CSS 4.0, jQuery, Responsive UI, Bootstrap, ReactJS, Node JS, Reactive Native, Redux.
<b>MQ12</b>	IAM subject matter expertise including at least one (1) key project team member currently certified as a Certified Information System Security Professional (CISSP).

**Additional desirable qualifications:**

- Knowledge of election systems and election process.

## **VII. PRICE PROPOSAL (10 points)**

### **A. Price Proposal Format**

Proposer shall provide a Price Proposal as part of the Written Proposal that includes the following:

- (a) Total fee for each of the disciplines/deliverables identified in the Scope of Work with a not-to-exceed figure.
- (b) Hourly rates for all team members. Hourly rates and itemized costs may be used to negotiate changes in the Scope of Work, if necessary
- (c) Indicate if any further discounts are offered, i.e. volume, quantity, prompt payment etc.

Proposer's pricing narrative, including any proposed price list discounts or markups, must remain firm during the term of the contract unless stated otherwise.

Payment for services will be based on COMPLETED AND ACCEPTED project milestones as defined in the project schedule and Deliverables (Section III.A). The City will have 45 days to review and accept milestone work products before payment.

### **B. Reserved (Price Proposal Evaluation Period)**

### **C. Reserved (Price Discrepancies)**

### **D. Reserved (Price Lists)**

### **E. Reserved (Proposing on Separate Items or in Aggregate(s))**

### **F. Application of Discounts for Evaluating Lowest Responsive Proposer**

#### **1. Reserved (LBE Bid Discount/Rating Bonus)**

#### **2. Prompt Payment Discounts**

Prompt Payment discount (discount for prompt payment) will not be taken into consideration in determining the Lowest Responsive Proposal.

#### **3. Reserved (Anticipated Local Tax Revenue (Admin Code Section 21.32) Discount)**

## **VIII. WRITTEN PROPOSAL (90 POINTS)**

In addition to submitting documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth below. *The content of all Proposals must consist of the information specified below, in the order outlined below, in order to be deemed responsive.*

### **A. Business Profile (5 Points)**

Provide a brief description of the Proposer's size and organization structure, including:

- 1.** Proposer's financial stability, capacity and resources supported by two (2) most recent annual financial statements by which City can analyze Proposer's financial resources. If financial statements are unavailable due to confidentiality reasons, submit recent Dun & Bradstreet reports. Include all lines of credits the City should consider in its analysis.
- 2.** A listing and description of any lawsuit resulting from (a) any public project undertaken by the Proposer or by its subcontractors where litigation is still pending or has occurred

within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.

## **B. Project Team (35 Points)**

Provide the following information for Proposer's Project Team.

### **1. Team Members**

Provide the role, responsibilities, qualifications, and company affiliation of every individual on the Proposer team who will perform the services outlined in this Solicitation. Discuss each team member's background and experience in order to demonstrate a strong ability to successfully perform the work.

### **2. Key/Lead Team Members**

Identify and provide resumes for all staff who will serve as the Key/Lead Team Members so that the Evaluation Panel can evaluate the ability of each team member to successfully fulfill their project roles and complete the scope of services.

Upload a letter of commitment from each Key/Lead Team Member. Each letter of commitment shall be signed by the applicable individual, and dated within five (5) days of the date that Proposals are due. Each letter of commitment must include a statement by the applicable individuals that, if the City awards an agreement to the Proposer, they intend to work on the Agreement at the percentage of work time specified by Proposer in its Proposal for the duration of the Agreement. Proposals lacking commitment letters from each Key/Lead Team Member may be rejected as non-responsive. The information required in this section for Key/Lead Team Members applies to any additional key/lead individuals proposed by the Proposer.

### **3. Team Organization Chart**

Attach an Organizational Chart that illustrates the team structure (include the integration/interaction with City project team staff). Note the Proposer name and title/role for each team member.

## **C. Qualifications Summary (10 Points)**

Proposer must demonstrate corporate qualifications, commitment, strength, and technical capabilities to fulfill all services specified and required to successfully accomplish the work. If Proposer is a JV, include a description of the organization, relationships, and defined responsibilities of all Partners in the JV. Describe any previous project-specific associations of the JV Partners. The Lead JV Partner shall demonstrate proven experience in managing and leading.

## **D. Past Projects (15 Points)**

Proposer must describe 2 most recent projects previously managed by the Proposer or, if applicable, JV Partners within the last 10 years.

- 1. Similar Size and Scope:** Each project must be of the type and scope of services specified in this Solicitation.
- 2. Project Details:** The descriptions shall include each item listed below.
  - a. Project name;
  - b. Project scope summary;
  - c. Dates when the project was performed;

- d. Project costs;
- e. Proposer's role and responsibilities in the project;
- f. Proposer's performance on delivering the project on schedule and on budget;
- g. Proposer staff members who worked on the project; and
- h. Client name, reference, and contact info.

**E. Work Approach (10 Points)**

Proposer must describe their overall work approach to successfully deliver the goods and/or services requested in this Solicitation by addressing each item listed below:

1. Approach for coordinating/managing all work activities, including coordination and communication with City staff, to meet project milestones and deliverable due dates.
2. Processes/measures for controlling cost and schedule, tracking delivery/performance, and maximizing quality (QA/QC).
3. Approach for monitoring expended labor hours and tracking various factors affecting task costs. Include description (frequency, days after timesheet submittal) of project manager's access to reports on staff labors hours and other cost items.
4. Processes for internal and external notification and resolution of technical conflicts and cost/schedule variances.
5. Understanding of potential project/task issues and constraints, and approach to managing project-specific challenges to complete tasks on schedule and within budget.

**F. Description of Goods/Services being Provided (15 Points)**

Proposer shall provide a Proposal consisting of the full line of goods and/or services being offered in response to this Solicitation, including manufacturer names and product descriptions, if applicable. Proposer must also provide detailed descriptions of how the Proposer will execute the work associated with each task outlined in this Solicitation. The description provided for each task should include, as appropriate, the following information:

- Task-specific approach and associated work elements;
- Dependencies on/among other tasks (including activities of others and required key information);
- Responsible party within the Proposer; and
- Output/deliverables from the task.

The task scopes and descriptions shall be of such form and in such manner and detail as to divide the work up into manageable segments.

The detailed task descriptions provided by the selected Proposer may constitute the scope of services identified in. Proposers should therefore provide enough information to clearly identify the work to be performed under each task. However, note that modification of tasks or extensive task descriptions submitted by Proposers shall not in any way lessen or eliminate any of the work elements outlined in this Solicitation.

**IX. ORAL INTERVIEWS**

The Evaluation Panel may hold oral interviews with Proposers that have met the Minimum Qualifications and whose Written Proposals received a minimum average score of at least 85 Points. Prior to Oral interviews, the City will send a letter to each invited Proposer regarding the format and general rules of the interview. The City reserves the right to limit participation in the panel interviews to Proposers' key/lead team members and to exclude, for example, sub-consultants on multiple teams. The interview evaluation process may include (and be scored based

on) a presentation by the Proposer and/or interview questions from the Evaluation Panel. Those questions may include and be related to Proposers' and key/lead team members' qualifications, their work approach, project task descriptions, team organization, and any questions which seek to clarify Proposal components. Proposers may also be scored on follow-up questions if clarification of Proposer's responses is necessary. The same set of interview questions will be used for all Proposers and shall be presented to Proposers at least one week prior to the date of interview to allow Proposers sufficient time to prepare their responses. The Evaluation Panel may ask follow-up questions if clarification of Proposer's responses is necessary. The Evaluation Panel will proceed to evaluate each Proposer based on each Proposer's presentation and responses.

## **X. INSURANCE AND BONDS**

### **A. Insurance**

Prior to award, the successful Proposer(s) will be required to furnish evidence of insurance as outlined in Attachment 1, City's Proposed Agreement Terms.

### **B. Reserved (Performance Bond)**

### **C. Reserved (Fidelity Bond)**

### **D. Failure to Provide Insurance and/or Bonds**

Unless otherwise stated, within ten business days of the receipt of a notice of award, the Proposer to whom the contract is awarded shall deliver the required bond documents and/or specified insurance certificates to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice from Purchasing, Purchasing may, at its option, determine that this Proposer has abandoned its Proposal. Thereupon the tentative award of said contract to this Proposer shall be canceled and City shall notify the Proposer's surety and collect on the Proposer's bond (or the check accompanying its Proposal shall be deposited with the Treasurer of the City and County of San Francisco for collection) and the proceeds thereof shall be retained by City as partial liquidated damages for failure of such Proposer to properly file the bonds and insurance herein required. The foregoing in no way limits the damages which are recoverable by City whether or not defined elsewhere in the contract documents.

## **XI. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS**

### **A. Solicitation Errors and Omissions**

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

### **B. Objections to Solicitation Terms**

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.



### **C. Solicitation Addenda**

The City may modify this Solicitation, prior to the Proposal due date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Solicitation Addenda issued by the City prior to the Proposal due date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal due date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

### **D. Proposal Term**

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

### **E. Revision to Proposal**

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal due date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal deadline for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

### **F. Proposal Errors and Omissions**

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

### **G. Financial Responsibility**

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

### **H. Proposer's Obligations under the Campaign Reform Ordinance**

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code. Local law prohibits City elected officials from soliciting or accepting contributions from any person or entity seeking to enter into a contract or grant worth \$100,000 or more with the City, if the contract or grant requires their approval or the approval of their appointees to the board of a state agency. This restriction applies to the party seeking the contract or grant, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the

awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

A person or entity that contracts with the City may not make a campaign contribution to an elected official if the contract would require approval by that official, a board on which the official serves, or a board of a state agency on which an appointee of the official sits. The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded or no grant is approved; or (2) twelve months have elapsed since the award of the contract or approval of the grant.

A violation of Section 1.126 may result in the criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at (415) 252-3100.

### **I. Reservations of Rights by the City**

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

### **J. No Waiver**

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

### **K. Other**

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:
  - a. Any condition set forth in this Solicitation;
  - b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
  - c. Delivery time(s)..
2. City reserves the right to inspect an awarded Proposer's place of business prior award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.

3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.

5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.