

VIII. PROPOSAL FORMAT

A. Introduction

This section contains instructions and prescribes the mandatory proposal format for the development and presentation of Bidder's RFP response. Format instructions must be adhered to, all requirements and questions in the RFP must be responded to, and all requested data must be supplied. There is no intent to limit the content of the bid. Additional information deemed appropriate by the Bidder and their proposed solution must be included. However, including irrelevant material only makes the evaluation more difficult. Do not include testimonials about products in the requirement responses. These may be included in Volume IV – Literature. It is the responsibility of the Bidder to respond in the prescribed format ensuring the Caltrans RDS Evaluation Team can locate all response information.

Page numbers should be located in the same page position throughout the proposal. Figures, tables, charts, etc. must be assigned index numbers and must be referenced by these numbers in the proposal text. Figures, etc. must be placed as close to text references as possible. All pages in the proposal must be consecutively numbered, and must be standard 8.5x11" paper (except charts, diagrams, etc., which may be foldouts). If foldouts are used, the folded size must fit within the 8.5x11" format. Each volume of the various proposal submissions must be provided separately in an appropriately sized binder.

It is the Bidder's responsibility to ensure its proposal is submitted in a manner that enables the Evaluation Team to easily locate all response descriptions and exhibits for each requirement of this RFP.

The following must be shown on each page of the proposal and cost data:

- RFP RDS-2660-421
- Name of Bidder
- Proposal Volume Number and Page Number
- Label: "Draft Proposal" or "Final Proposal" or "Cost Proposal"

The proposal package must be completely sealed. All proposal package submissions must be clearly labeled "RFP RDS-2660-421". Submissions must be identified as the proposal (Draft or Final), or Cost Data (cost data must be sealed and submitted separately from the proposal) and include the Bidder's name and return address. Each proposal package must include one complete set of all volumes containing original signatures marked "Master Copy".

Bidders must notify the Procurement Official when the proposal (Draft and Final) are being delivered.

Bidders must ensure that no costs are included in the Draft or Final Proposal, except in the sealed Volume III – COST DATA envelope, submitted with Final Proposal. The inclusion of pricing in any fashion or format in any other place in the proposal may result in immediate rejection of the bid (e.g. “provided at no additional cost..., etc.”). Supporting literature containing costs or rates (such as catalogs, maintenance service rates, etc.), submitted as part of the proposal must have all cost figures replaced with “XXXX.”

B. Final Proposal Format and Content

Failure to clearly identify the proposal on the outside of the package may result in the rejection of the proposal. The State is not responsible for receipt of any Final Proposal, which is improperly labeled, and accepts no responsibility for lost and/or late delivery of Final Proposals.

Bidders must not retype or edit the templates, or forms, except to enter requested information. Making a material change to any form may make the Bidder's proposal unacceptable to the State and may cause the proposal to be excluded from further consideration.

The complete proposal should be submitted in the format and numbers of copies indicated, and include the following items:

1. Volume I—Response to Requirements (1 Master copy and 10 copies)

This volume must contain all responses to the ADMINISTRATIVE REQUIREMENTS (RFP Section V), and TECHNICAL REQUIREMENTS (Section VI) of the RFP. All forms and questionnaires, EXCEPT for cost data, must be completed and included in this volume. Volume I will be incorporated into both contracts as appropriate. If customer references were submitted with the Draft Proposals but were incomplete or, were not submitted with the Draft Proposals, one copy of sealed references is required in the Final Proposal.

The organization is to be as follows:

Section 1—Cover Letter and Executive Summary (Appendix C, Requirements A1 and A2)

Section 2—Administrative Requirements Response (Appendix C, Requirements A3 through A19)

Section 3—Technical Requirements Response (Appendix D)

Section 3 should contain tabs to separate each of the following sections:

- Tab 1: Project Management
- Tab 2: System Administration
- Tab 3: Mandatory Functional
- Tab 4: Desirable Functional
- Tab 5: Other Technical Requirements

2. Volume II—Completed Contracts (1 Master copy and 1 copy)

This volume must contain the complete contract terms and conditions and all Attachments, complete in every detail. The Standard Agreement Form 213IT must be signed.

3. Volume III—Cost Data (1 Master copy and 10 copies)

This volume must be in a separately sealed, marked envelope or container containing all completed cost sheets and any other document with cost data identified as required in this RFP. Volume III will be incorporated into the contracts as appropriate.

The organization is to be:

Section 1—Cost Worksheets (Forms VII-1 through VII-8)

Section 2—Letter of Bondability

4. Volume IV—Literature (1 Master copy and 10 copies)

This volume must contain all technical and other reference literature the Bidder deems necessary to support the responses to the requirements of this RFP. **This volume must be tabulated so that the various reference materials can be located for evaluation purposes.**

5. Electronic Response Requirements

Two CD's must be included with Volume I containing all of Volume I response data in electronic form (Word or searchable PDF), two CD's must be included with Volume III containing all cost data (separate sealed with Volume III hardcopy and not in PDF format), and two CD's may be included with Volume IV containing electronic copies of any technical or other reference literature.

C. Draft Proposal Format and Content

The Draft Proposal must contain all the material specified above for the Final Proposal **except cost figures**. The costs should all be indicated with “XXXX”. The completed contract (Appendix A), including Attachments **must also be included with products and services identified, but no cost figures included**. The contract need **not** be signed at this point. It is **important that all cost tables/sheets**, with **all entries except cost figures**, be included. The number of copies of the Draft Bid to be submitted for validation is as follows:

Volume I—	1 Master copy and 10 copies
Volume II—	1 Master copy and 1 copy
Volume III—	1 Master copy and 10 copies
Volume IV—	1 Master copy and 10 copies

If sealed customer reference questionnaires submitted with Draft Proposals were complete, no additional submission is required with the Final Proposal.