



## NOTICE OF SOLICITATION

SERIAL 190178-RFP

### REQUEST FOR PROPOSAL FOR: STRATEGIC CONSULTING SERVICES

Notice is hereby given that Maricopa County is conducting this request for proposals, electronically through an outside agent, BidSync.com, until **2:00 P.M. Phoenix Time (M.S.T.)** on **NOVEMBER 6, 2018** for **SERIAL # 190178-RFP REQUEST FOR PROPOSALS FOR STRATEGIC CONSULTING SERVICES** for Maricopa County.

To participate in this bidding process, vendors shall register through BidSync.com. To register with BidSync, please go to ([www.BidSync.com](http://www.BidSync.com)) and click on the orange 'Register' link. Registration has no cost, and will allow you to access all of the bid information, bid documents, receive bid notifications, and submit a response. **ONLY RESPONSES THAT ARE SUBMITTED THROUGH BIDSYNC.COM WILL BE CONSIDERED FOR AWARD.**

For assistance, please contact BidSync Vendor Support Department via phone or email, during regular business hours: 1-800-990-9339 or ([support@BidSync.com](mailto:support@BidSync.com)).

All responses shall be submitted **electronically** to BidSync.com prior to the bid closing. The bid will be listed under **"190178-RFP REQUEST FOR PROPOSAL FOR STRATEGIC CONSULTING SERVICES"**.

The Maricopa County Procurement Code ("The Code") governs this procurement and is incorporated by reference. Any protest concerning this Request for Proposal must be filed with the Procurement Officer in accordance with Section MC1-905 of the Code.

**ALL ADMINISTRATIVE INFORMATION CONCERNING THIS REQUEST FOR PROPOSAL CAN BE LOCATED AT (<https://www.maricopa.gov/DocumentCenter/View/6453>).**

**ANY ADDENDA TO THIS REQUEST FOR PROPOSAL WILL BE POSTED ON THE MARICOPA COUNTY OFFICE OF PROCUREMENT SERVICES WEB SITE UNDER THE SOLICITATION SERIAL NUMBER. THIS INFORMATION WILL ALSO BE POSTED ONLINE AT ([WWW.BIDSYNC.COM](http://WWW.BIDSYNC.COM)).**

**FAILURE TO REVIEW ANY ADDENDA DOES NOT NEGATE YOUR INITIAL OFFER AND HOLDS THE RESPONDENT RESPONSIBLE FOR ANY CHANGES PRIOR TO BID CLOSING.**

DIRECT ALL INQUIRIES TO:

ELENA SNOW  
PROCUREMENT OFFICER  
TELEPHONE: (602) 506-3274  
EMAIL: [snowe@mail.maricopa.gov](mailto:snowe@mail.maricopa.gov)

**THERE WILL BE AN OPTIONAL PRE-PROPOSAL CONFERENCE ON NOVEMBER 1, 2018 AT 2:00 P.M. M.S.T., AT THE MARICOPA COUNTY OFFICE OF PROCUREMENT SERVICES, 1<sup>ST</sup> FLOOR CONFERENCE ROOM, 320 WEST LINCOLN STREET, PHOENIX, ARIZONA 85003. TELECONFERENCE LINE 602-506-9695 AND ENTERING PASS CODE: 671693.**

**NOTE: MARICOPA COUNTY PUBLISHES ITS SOLICITATIONS ONLINE AND THEY ARE AVAILABLE FOR VIEWING AND/OR DOWNLOADING AT THE FOLLOWING INTERNET ADDRESS:**

<https://www.maricopa.gov/2191/Open-Solicitations>

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### NOTICE

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**REQUEST FOR PROPOSAL FOR: STRATEGIC CONSULTING SERVICES**

**1.0 INTENT:**

Maricopa County is seeking proposals from qualified individuals/firms to create a list of approved consultants to be selected through individual Task Orders for various consulting engagements. Examples of the types of consulting engagements are listed below under Section 2.0 Scope of Work.

Multiple Departments may utilize these services through the Task Order process. The county reserves the right to select any qualified vendor under this contract for Task Orders valued under \$25,000 without further competition, based on the County's needs, as long as the work is clearly defined as a onetime need and is approved by the Office of Procurement Services. Vendors receiving an award under this contract will be notified of requirements valued over \$25,000 and they will be given time to respond to the Task Order with their proposed work plan, staff and price. The vendor that best meets the need of the county will be awarded the Task Order.

Award of this contract does not guarantee award of any individual Task Order. Maricopa County is aware that there may be categories of strategic planning services that we have not included, but may be useful to the county. In your proposal, explain such categories and your firm's qualifications for such.

Other governmental entities under agreement with the County may have access to services provided hereunder (see also Section 3.9 and 3.10 below).

The County reserves the right to add additional contractors, at the County's sole discretion, in cases where the currently listed contractors are of an insufficient number or skill-set to satisfy the County's needs or to ensure adequate competition on any project or task order work.

**2.0 SCOPE OF WORK:**

2.1 To assist Maricopa County with its succession planning and other organizational management needs, the County is looking for organizations that provide professional services including, but not limited, to:

2.1.1 LEADERSHIP DEVELOPMENT - Developing the skills of leadership including, but not limited to, communication, ability to motivate others, decision making, and accountability.

2.1.2 ORGANIZATIONAL ANALYSIS AND PROCESS IMPROVEMENT – Assess current effectiveness of the existing workforce including work processes and procedures, programs, measurement and structure. Identify underlying management and cultural challenges. Develop recommendations and solutions based on the assessment.

2.1.3 MANAGEMENT AND SUPERVISION TRAINING – Develop training strategies for the adult learners including workshops, lectures, group discussions, case studies, skill practices, or other agreed upon methods based upon identified competencies required that enables participants to understand how they contribute to the health of the organization.

2.1.4 SUCCESSION PLANNING – Assess and understand County's workforce needs and develop a plan focusing on targeted improvements to recruitment, selection, workforce training, and promotional processes needed to develop a sustainable organization.

2.1.5 COACHING – Provide coaching services to middle, senior and executive level staff assisting them with learning the skills needed for effective team building, performance management, and organizational effectiveness.

2.2 The contractor will work with the County department requesting the task order for approval of all programs, trainings, and processes utilized to provide the requested services. All plans,

recommendations, solutions and processes developed will be delivered to the County department in the agreed format and timeframe.

- 2.3 The contractor will facilitate necessary meetings that include but are not limited to training, coaching, process implementation, planning, progress reporting. The type and frequency of any meetings will be agreed upon issuance of any task order.
- 2.4 Qualification requirements will vary depending on the consulting engagement and will be tailored to the specific task order; however, the following general qualifications apply to all engagements:
  - 2.4.1 A minimum of five (5) years of experience providing organizational effectiveness consulting for the public sector or demonstrated expertise in management, leadership development, organizational analysis, process improvement, succession planning and coaching.
  - 2.4.2 Demonstrated expertise in management, leadership development, organizational analysis, process improvement, succession planning and coaching.
  - 2.4.3 Include resume and/or profile of key staff.
- 2.5 **OTHER CONSULTING SERVICES:**

Maricopa County is aware that there may be other related services not included above that may be useful to the County. In your proposal, explain such services and your firm's qualifications for such.
- 2.6 **ADDITIONAL PRICING CATEGORIES:**

In addition to the items requested in Attachment A "Pricing," a vendor may wish to include additional "work titles" and corresponding hourly rates. Please add these titles and the rates in Attachment A. Make sure to address each work title in the proposal.

### **3.0 PROCUREMENT REQUIREMENTS:**

- 3.1 **PERFORMANCE:**

It shall be the Contractor's responsibility to meet the proposed performance requirements. Maricopa County reserves the right to obtain services on the open market in the event the Contractor fails to perform and any price differential will be charged against the Contractor.
- 3.2 **MISCELLANEOUS CONTRACTOR REQUIREMENTS:**
  - 3.2.1 Hourly rates are to be all inclusive to include general office supplies, faxes, local travel expenses and general administrative functions. Local travel is defined as a 50 mile radius from 301 W. Jefferson St., Phoenix, Arizona 85003.
  - 3.2.2 Unless previously approved in writing by the County, no payment shall be made for miscellaneous charges for ordinary and customary services (e.g., copying, printing, mileage, parking, courier charges, telephone, fax charges). Such charges are considered overhead and are part of the hourly rates agreed to (see attachment A).
- 3.3 **CONTRACTOR EMPLOYEE MANAGEMENT:**
  - 3.3.1 Contractor shall endeavor to maintain the personnel proposed in their proposal throughout the performance of this Contract. In the event that Contractor personnel's employment status changes, Contractor shall provide County a list of proposed candidates with equivalent experience. Under no circumstances is it acceptable for any implementation schedule to be impacted by a personnel change on the part of the Contractor.

- 3.3.2 Contractor shall not reassign any key personnel from an awarded Task Order without the express consent of the County.
- 3.3.3 County reserves the right to immediately remove from its premises any Contractor personnel it determines is a risk to County operations.
- 3.3.4 County reserves the right to request the replacement of Contractor personnel at any time, for any reason. Said requested removal shall not be subject to part 3.3.1 of this section.

3.4 USAGE REPORT:

The Contractor shall furnish the County a usage report, upon request, delineating the acquisition activity governed by the Contract. The format of the report shall be approved by the County and shall disclose the quantity and dollar value of each contract item by individual unit.

3.5 BACKGROUND CHECK:

Bidders/proposers need to be aware that there may be multiple background checks (Sheriff's Office, County Attorney's Office, Courts as well as Maricopa County general government) to determine if the respondent is acceptable to do business with the County. This applies to (but is not limited to) the company, subcontractors and employees and the failure to pass these checks shall deem the respondent non-responsible.

3.6 INVOICES AND PAYMENTS:

3.6.1 The Contractor shall submit one (1) legible copy of their detailed invoice before payment(s) can be made. Incomplete invoices will not be processed. At a minimum, the invoice must provide the following information:

- Company name, address and contact
- County bill-to name and contact information
- Contract Serial Number
- County purchase order number
- Invoice number and date
- Payment terms
- Date of service or delivery
- Quantity
- Contract Item number(s)
- Description of Purchase (services)/Project title
- Hours by project team member
- Pricing per unit of purchase
- Extended price
- Arrival and completion time
- Total Amount Due

3.6.2 Problems regarding billing or invoicing shall be directed to the Department as listed on the Purchase Order.

3.6.3 Payment shall only be made to the Contractor by Accounts Payable through the Maricopa County Vendor Express Payment Program. This is an Electronic Funds Transfer (EFT) process. After Contract Award the Contractor shall complete the Vendor Registration Form located on the County Department of Finance Vendor Registration Web Site (<http://www.maricopa.gov/922/Vendors>).

3.6.4 Discounts offered in the contract shall be calculated based on the date a properly completed invoice is received by the County.

3.6.5 EFT payments to the routing and account numbers designated by the Contractor will include the details on the specific invoices that the payment covers. The Contractor is

required to discuss remittance delivery capabilities with their designated financial institution for access to those details.

**3.7 APPLICABLE TAXES:**

3.7.1 Payment of Taxes: The Contractor shall pay all applicable taxes. With respect to any installation labor on items that are not attached to real property performed by Contractor under the terms of this Contract, the installation labor cost and the gross receipts for materials provided shall be listed separately on the Contractor's invoices.

3.7.2 State and Local Transaction Privilege Taxes: To the extent any State and local transaction privilege taxes apply to sales made under the terms of this contract it is the responsibility of the seller to collect and remit all applicable taxes to the proper taxing jurisdiction of authority.

3.7.3 Tax Indemnification: Contractor and all subcontractors shall pay all Federal, State, and local taxes applicable to its operation and any persons employed by the Contractor. Contractor shall, and require all subcontractors to hold Maricopa County harmless from any responsibility for taxes, damages and interest, if applicable, contributions required under Federal, and/or State and local laws and regulations, and any other costs including; transaction privilege taxes, unemployment compensation insurance, Social Security, and Worker's Compensation.

**3.8 TAX (SERVICES):**

No tax shall be invoiced or paid against Contractor's labor. It is the responsibility of the Contractor to determine any and all applicable taxes and include the cost in the proposal price.

**3.9 STRATEGIC ALLIANCE for VOLUME EXPENDITURES (\$AVE):**

The County is a member of the \$AVE cooperative purchasing group. \$AVE includes the State of Arizona, many Phoenix metropolitan area municipalities, and many K-12 unified school districts. Under the \$AVE Cooperative Purchasing Agreement, and with the concurrence of the successful Respondent under this solicitation, a member of \$AVE may access a contract resulting from a solicitation issued by the County. If you do not want to grant such access to a member of \$AVE, please so state in your proposal. In the absence of a statement to the contrary, the County will assume that you do wish to grant access to any contract that may result from this Request for Proposal.

**3.10 INTERGOVERNMENTAL COOPERATIVE PURCHASING AGREEMENTS (ICPA's):**

County currently holds ICPA's with numerous governmental entities. These agreements allow those entities, with the approval of the Contractor, to purchase their requirements under the terms and conditions of the County Contract. It is the responsibility of the non-County government entity to perform its own due diligence on the acceptability of the Contract under its procurement rules, processes and procedures.

**3.11 POST AWARD MEETING:**

The Contractor may be required to attend a post-award meeting with the Department to discuss the terms and conditions of this Contract. This meeting will be coordinated by the Procurement Officer of the Contract.

**3.12 ISRAEL BOYCOTT:**

By submitting this proposal the Contractor certifies that they are in compliance with Article 9, A.R.S. § 35-393 *et seq.*

**3.13 CONFIDENTIALITY:**

In the course of the solicitation process, the County may disclose information that is proprietary or confidential. By submitting a proposal to the solicitation, the offeror agrees that, except as necessary to prepare a response to this solicitation, neither it nor its agents or employees will communicate, divulge or disseminate to any third party-persons or entities, any information that is disclosed to it by the County during the course of these discussions without the express written authorization of the County. If the offeror does disclose County proprietary or confidential information to a third party in preparing a response to this solicitation, it shall require the third party to acknowledge and comply with this provision.

3.14 PUBLIC RECORDS:

Under Arizona law, all Offers submitted and opened are public records and must be retained by the Records Manager at the Office of Procurement Services. Offers shall be open to public inspection and copying after Contract award and execution, except for such Offers or sections thereof determined to contain proprietary or confidential information by the Office of Procurement Services. If an Offeror believes that information in its Offer or any resulting Contract should not be released in response to a public record request under Arizona law, the Offeror shall indicate the specific information deemed confidential or proprietary and submit a statement with its offer detailing the reasons that the information should not be disclosed. Such reasons shall include the specific harm or prejudice which may arise from disclosure. The Records Manager of the Office of Procurement Services shall determine whether the identified information is confidential pursuant to the Maricopa County Procurement Code.

4.0 **CONTRACTUAL AND SPECIAL TERMS & CONDITIONS:**

4.1 **DRAFT CONTRACT SEE EXHIBIT 4:**

5.0 **INSTRUCTIONS TO RESPONDENTS: (Please note that this Section does not become part of any resultant contract.)**

Proposers are solely responsible for submitting proposals, and any modifications or withdrawals, to be received at the time and designated location required by the solicitation (ITN, RFP, or any other solicitation notice).

Any proposal, modification, or withdrawal received after the designated time is “late” and will be rejected and shall not be evaluated per Paragraph MC1-320 of the Maricopa County Procurement Code.

5.1 SCHEDULE OF EVENTS:

Request for Proposals Issued: October 17, 2018

Pre-Proposal Conference: November 1, 2018

Deadline for written questions is two (2) business days after Pre-Proposal Conference. Questions will ***not*** be responded to prior to the Pre-Proposal Conference or after the two (2) business day deadline has elapsed. All questions and answers shall be posted to ([www.bidsync.com](http://www.bidsync.com)) under the Q&A’s tab for the solicitation and must be received by the end of business, 5:00 P.M., Phoenix time (M.S.T.).

Proposals Opening Date: November 6, 2018

Deadline for submission of proposals is 2:00 P.M., Phoenix time (M.S.T.) on **NOVEMBER 6, 2018**. All proposals must be received before 2:00 P.M., Phoenix time (M.S.T.), on the date above via BidSync.com.

Proposed review of Proposals and short list decision: November 20, 2018

Proposed Respondent presentations: (if required) November 22, 2018

Proposed selection and negotiation:	<u>November 29, 2018</u>
Proposed Best & Final (if required)	<u>December 5, 2018</u>
Proposed award of Contract:	<u>December 13, 2018</u>

All responses to this Request for Proposal become the property of Maricopa County and (other than pricing) will be held confidential, to the extent permissible by law. The County will not be held accountable if material from proposal responses is obtained without the written consent of the Respondent by parties other than the County.

5.2 INQUIRIES AND NOTICES:

All inquiries concerning information herein shall be addressed to:

Maricopa County  
Office of Procurement Services  
320 West Lincoln Street  
Phoenix, Arizona 85003

Administrative telephone inquiries shall be addressed to:

Elena Snow, Procurement Officer 602-506-3274  
([snowe@mail.maricopa.gov](mailto:snowe@mail.maricopa.gov))

Inquiries may be submitted by telephone but must be followed up in writing. No oral communication is binding on Maricopa County.

5.3 INSTRUCTIONS FOR PREPARING AND SUBMITTING PROPOSALS:

Respondents shall submit their proposals electronically via the BidSync.com system in accordance with Section 5.5 as follows:

- Respondents shall upload each response document individually.
- All documents must be uploaded in their native file format (Word, Excel, etc.).
- The following naming convention shall be utilized for each document: Vendor Name – Document Name as indicated in section 5.5
- In the event that the Respondent would like to request that certain documents be held confidential, they need to have a name indicating confidential. Please see Exhibit 4 – Draft Contract section 6.33 Public Records for more information.
- Proposals shall be signed by an owner, partner or corporate official who has been authorized to make such commitments (Attachment B). All prices shall be held firm for a period of one year after the RFP closing date.

5.4 GENERAL CONTENT:

5.4.1 The Proposal should be specific and complete in every detail. It should be practical and provide a straightforward, concise delineation of capabilities to satisfactorily perform the Contract being sought.

5.4.2 The Respondent should not necessarily limit the proposal to the performance of the services in accordance with this Request for Proposal but should outline any additional services and their costs if the Respondent deems them necessary to accomplish the program. Maricopa County is aware that there may be categories of strategic planning services that we have not included, but may be useful to the county. In your proposal, explain such categories and your firm's qualifications for such.



5.5 FORMAT AND CONTENT:

To aid in the evaluation, it is desired that all proposals follow the same general format. The proposal must be submitted electronically and have sections clearly labeled as below: (Responses are limited to 10 pages, 10 point font type, plus any attachments or other required documents).

5.5.1 Letter of Transmittal (Exhibit 2)

5.5.2 Executive Summary – This section shall contain an outline of the general approach utilized in the proposal.

5.5.3 Proposal – This section should contain a statement of all of the programs and services proposed, including conclusions and generalized recommendations. Proposals should be all-inclusive, detailing respondent’s best offer.

5.5.4 Qualifications – This section shall describe the respondent’s ability and experience related to the programs and services proposed. Summarize related professional experience, certifications, and any other qualifications your firm can offer. All project personnel, as applicable, shall be listed including a description of assignments and responsibilities, a resume of professional experience, an estimate of the time each would devote to this program, and other pertinent information.

5.5.5 Proposal exceptions

5.5.6 Attachment A (Pricing)

5.5.7 Attachment B (Agreement Page)

5.5.8 Attachment C (References)

5.5.9 Exhibit 3, Sole Proprietor Waiver (If applicable)

5.6 EXCEPTIONS TO THE SOLICITATION:

The Respondent shall identify and list all exceptions taken to all sections of 190178-RFP and list these exceptions referencing the section (paragraph) where the exception exists and identify the exceptions and the proposed wording for the Respondent’s exception under the heading, “Exception to the PROPOSAL Solicitation, SERIAL 190178-RFP”. **Exceptions that surface elsewhere and that do not also appear under the heading, “Exceptions to the PROPOSAL Solicitation, SERIAL 190178-RFP,” shall be considered invalid and void and of no contractual significance.**

The County reserves the rights to; accept any exception, discuss the exemption with the offeror, or reject any exception.

5.7 EVALUATION OF PROPOSAL – SELECTION FACTORS:

A Proposal Evaluation Committee shall be appointed, chaired by the Procurement Officer to evaluate each Proposal. At the County’s option, Respondents may be invited to make presentations to the Evaluation Committee. Best and Final Offers and/or Negotiations may be conducted, as needed, with the highest rated Respondent(s). Proposals will be evaluated on the following criteria which are listed in descending or equal order of importance.

5.7.1 Respondent Qualifications and Compliance with Specifications

5.7.2 Respondent Demonstrated Experience in providing Consulting Services

5.7.3 Price

**NOTE 1: RESPONDENTS ARE REQUIRED TO USE ATTACHED FORMS TO SUBMIT THEIR PROPOSAL.**

**NOTE 2: RESPONDENTS ARE STRONGLY ENCOURAGED TO REVIEW MARICOPA COUNTY'S PROCUREMENT ADMINISTRATIVE INFORMATION PRIOR TO SUBMITTING A BID. FOR THIS INFORMATION, GO TO: (<https://www.maricopa.gov/DocumentCenter/View/6453>).**

**ATTACHMENT A**

**PRICING**

PLEASE SEE EXCEL FILE: 190178-Attachment A Pricing.xlsx

ATTACHMENT B

AGREEMENT

Respondent hereby certifies that Respondent has read, understands and agrees that acceptance by Maricopa County of the Respondent's Offer will create a binding Contract. Respondent agrees to fully comply with all terms and conditions as set forth in the Maricopa County Procurement Code, and amendments thereto, together with the specifications and other documentary forms herewith made a part of this specific procurement.

**BY SIGNING THIS PAGE THE SUBMITTING RESPONDENT CERTIFIES THAT RESPONDENT HAS REVIEWED THE ADMINISTRATIVE INFORMATION AND STANDARD CONTRACT'S TERMS AND CONDITIONS LOCATED AT <http://www.maricopa.gov/DocumentCenter/View/6453> AND AGREE TO BE CONTRACTUALLY BOUND TO THEM.**

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Small Business Enterprise (SBE)

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\_\_\_\_\_  
RESPONDENT (FIRM) SUBMITTING PROPOSAL

\_\_\_\_\_  
FEDERAL TAX ID NUMBER

\_\_\_\_\_  
DUNS #

\_\_\_\_\_  
PRINTED NAME AND TITLE

\_\_\_\_\_  
AUTHORIZED SIGNATURE

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
TELEPHONE

\_\_\_\_\_  
FAX #

\_\_\_\_\_  
CITY

\_\_\_\_\_  
STATE

\_\_\_\_\_  
ZIP

\_\_\_\_\_  
DATE

\_\_\_\_\_  
WEB SITE

\_\_\_\_\_  
EMAIL ADDRESS

ATTACHMENT C

RESPONDENT'S REFERENCES

RESPONDENT SUBMITTING PROPOSAL: \_\_\_\_\_

1. COMPANY NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

2. COMPANY NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

3. COMPANY NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

4. COMPANY NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

5. COMPANY NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

## EXHIBIT 1

### BIDSYNC REGISTRATION AND ELECTRONIC SUBMISSION REQUIREMENTS

BidSync.com Registration is FREE and REQUIRED for all vendors.

Register On-line at (<https://www.bidsync.com>).

Select Free Registration. Upon completion of your on-line registration, you are responsible for updating any changes to your information. Please retain your Login ID and Password for future use.

For assistance, please contact BidSync Vendor Support Department via phone or email, during regular business hours: 1-800-990-9339 or ([agency support@BidSync.com](mailto:agency support@BidSync.com)).

### **BIDSYNC ELECTRONIC SUBMISSION INSTRUCTIONS**

When submitting a response (proposal, quote or bid) electronically through BidSync, it is the sole responsibility of the supplier to ensure that the response is received by BidSync prior to the closing date and time. Each of the following steps in BidSync MUST be completed in order to place an offer:

- A. Login to [www.bidsync.com](http://www.bidsync.com);
- B. Locate the bid (solicitation) to which you are responding;
  - a. Click the "Search" tab on the top left of the page;
  - b. Enter keyword or bid (solicitation) number and click "Search";
- C. Click on the "Bid title/description" to open the Bid (solicitation) Information Page;
- D. "View and Accept" documents in the document section;
- E. Select "Place Offer" found at the bottom of the page;
- F. Enter your pricing, notes, other required information, and upload attachments to this page;
- G. Click "Submit" at the bottom of the page;
- H. Review Offer(s); and
- I. Enter your password and click "Confirm".

Note that the final step in submitting a response involves the supplier's acknowledgement that the information and documents entered into the BidSync system are accurate and represent the supplier's actual proposal, quote or bid. This acknowledgement is registered in BidSync when the supplier clicks "Confirm". BidSync will post a notice that the offer has been received. This notice from BidSync MUST be recorded prior to the closing date and time or the response will be considered late and will not be accepted. Be aware that entering information and uploading documents into BidSync may take considerable time. Please allow sufficient time to complete the online forms and upload documents. Suppliers should not wait until the last minute to submit a response. It is recommended that

suppliers submit responses a minimum of 24 hours prior to the closing deadline. The deadline for submitting information and documents will end at the closing time indicated in the solicitation. All information and documents must be fully entered, uploaded, acknowledged (Confirm) and recorded into BidSync before the closing time or the system will stop the process and the response will be considered late and will not be accepted.

Responses submitted in BidSync are completely secure. No one (including County purchasing staff) can see responses until after the deadline. Suppliers may modify or change their response at any time prior to the closing deadline. However, all modifications or changes must be completed and acknowledged (Confirm) in the BidSync system prior to the deadline. BidSync will post a notice that the modification/change (new offer) has been received. This notice from BidSync MUST be recorded prior to the closing date and time or the response will be considered late and will not be accepted. If you have not been asked to enter your password and click Save to save your response, your offer has not been updated.

Please be aware that typing in your password acts as your electronic signature, which is just as legal and binding as an original signature. (See Electronic Signatures in Global and National Commerce Act for more information.)

**EXHIBIT 2**

**SAMPLE TRANSMITTAL LETTER**

(To be typed on the letterhead of Offeror)

Maricopa County  
Office of Procurement Services  
320 West Lincoln Street  
Phoenix, Arizona 85003-2494

Re: 190178-RFP, STRATEGIC CONSULTING SERVICES

To Whom It May Concern:

(NAME OF COMPANY) (Herein referred to as the "RESPONDENT"), hereby submits its response to your Request for Proposal dated \_\_\_\_\_, and agrees to perform as proposed in their proposal, if awarded the contract. The Respondent shall thereupon be contractually obligated to carry out its responsibilities respecting the services proposed.

Kindly advise this in writing on or before \_\_\_\_\_ if you should desire to accept this proposal.

Very truly yours,

\_\_\_\_\_  
NAME (please print)

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
TITLE (please print)



**EXHIBIT 3**

**SOLE PROPRIETOR WAIVER**



**MARICOPA COUNTY RISK MANAGEMENT  
222 North Central Avenue, Suite 1110  
Phoenix, Arizona 85004**

**SOLE PROPRIETOR WAIVER**

**NOTE: THIS FORM APPLIES ONLY TO MARICOPA COUNTY DEPARTMENTS, DISTRICTS, BOARDS, COMMISSIONS AND UNIVERSITIES UTILIZING SOLE PROPRIETORS WITH NO EMPLOYEES. IF YOU ARE CONTRACTING WITH A CORPORATION, LIMITED LIABILITY COMPANY, PARTNERSHIP OR SOLE PROPRIETORS WITH EMPLOYEES, THIS FORM DOES NOT APPLY.**

The following is a written waiver under the compulsory Workers' Compensation laws of the State of Arizona, A.R.S. §23-901 (et. seq.), and specifically, A.R.S. §23-961(L), that provides that a Sole Proprietor may waive his/her rights to Workers' Compensation coverage and benefits.

I am a sole proprietor and I am doing business as \_\_\_\_\_ (name of Sole Proprietor's Business). I am performing work as an independent contractor for Maricopa County. For Workers' Compensation purposes, therefore, I am not entitled to Workers' Compensation benefits from Maricopa County.

I understand that if I have any employees working for me, I must maintain Workers' Compensation insurance on them.

_____			
Name of Sole Proprietor	Social Security Number	Telephone Number	
_____			
Street Address / P.O. Box	City	State	Zip Code
_____			
Signature of Sole Proprietor			Date
_____			
Maricopa County Office of Procurement Services			
_____			
Signature of Procurement Officer			Date

**Both signatures must be present and the completed form submitted by the Procurement Officer to Maricopa County Risk Management, 222 North Central Avenue, Suite 1110, Phoenix, AZ 85004. An authorized Risk Management Representative will sign and return to the Maricopa County Office of Procurement Services to be maintained in their records.**

\_\_\_\_\_  
Signature of Risk Management Representative

\_\_\_\_\_  
Date

**EXHIBIT 4**

**DRAFT CONTRACT**

PLEASE SEE WORD FILE: 190178-Exhibit 4 Draft Contract.doc

EXHIBIT 6

**INSURANCE CERTIFICATE EXAMPLE**

**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:		
	PHONE (A/C, No., Ext):	FAX (A/C, No):	
	E-MAIL ADDRESS:		
INSURED	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A:		
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

**COVERAGES**                      **CERTIFICATE NUMBER:**                      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COM/POB AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED   RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)							

<b>CERTIFICATE HOLDER</b>	<b>CANCELLATION</b>
	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE