



EQUUS[®]

WORKFORCE SOLUTIONS

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Online Learning Library System

REQUEST FOR PROPOSAL (RFP)

SOLICITATION #: EWS 2024-01

ISSUE DATE: 06/07/2024

EQUUS WORKFORCE SOLUTIONS

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Louisville, KY 40223

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1.0 GENERAL INFORMATION

1.1 Company Background

Arbor E&T, LLC, dba Equus Workforce Solutions (Equus) is a limited liability company under parent company, APM Human Services International Limited. Based in Louisville, KY, Equus is the nation's leading and most comprehensive provider of services and solutions designed to help put people to work. Within this business, Equus operates a combination of career centers, Job Corps centers, public assistance to work programs, business services and family supports. Equus is the largest for-profit provider of workforce and related solutions in the U.S. With more than 350 Equus-managed operations throughout the nation, our teams of more than 3,000 workforce professionals set the industry standards for best practices. Equus is a contractor to Federal, state, and local/regional funders, assisting nearly one million job seekers and thousands of employers a year. Our goals include helping individuals and families to reach self-sufficiency and to enhance the competitiveness of businesses. *Equus is a Federal Government Contractor and complies with Federal Acquisitions Regulations (FAR) for contracting purposes to remain compliant as a service provider.*

1.2 Contract Type

The Contract resulting from this procurement will be a fee for service contract.

1.3 Contract Term

The initial contract shall be for one year and shall commence from the date of full contract execution by the parties in 2024. As of the Notice to Proceed Date, the Contractor shall perform all activities required by the Contract, including the requirements of this solicitation, and the offerings in its Technical Proposal, for the compensation described in its Financial Proposal. Equus, at its sole option, may renew the term of the Contract through four (4) additional one-year renewal options for a total potential contract length of up to five (5) years.

1.4 Procurement Representative

The Procurement Representative will be the Single Point of Contact (SPOC) prior to the award of the contract.

Brian Hall
Procurement Manager
805 N. Whittington Parkway
Louisville, Kentucky 40222
502-630-7226
Brian.Hall@brightspringhealth.com

1.5 Pre-proposal Conference

A Pre-Proposal Conference will not be held. However, written questions can be submitted to the SPOC via email. Emails must contain the Solicitation Number EWS 2024-01 in the subject line and should be submitted prior to 5:00 PM Eastern Time on June 28, 2024.

1.6 Procurement Method

The Contract resulting from this RFP will be awarded in accordance with the U.S. federal government's FAR competitive procurement practices, 2 CFR 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, and Equus procurement policy. These guidelines require that procurement transactions be conducted in a

manner that provides for maximum free and open competition, regardless of the dollar amount or the procurement method used.

1.7 Proposal Closing Date

All proposals must be received by the SPOC via email at Brian.Hall@brightspringhealth.com no later than 5:00 PM Eastern Time on June 28, 2024. Requests for extension of this date or time shall not be granted. Multiple/alternative Proposals will not be accepted. Proposals received after the closing date and time will not be considered.

1.8 Preparation and Award

Proposals should be prepared simply and economically and provide a straightforward and concise description of the Contractor's Proposal to meet the requirements of this RFP. A Contract shall be awarded to the Contractors submitting the Proposal that has been determined to be the most advantageous to Equus, considering price and evaluation factors set forth in this RFP for providing the products/services as specified within.

1.9 Duration of Proposal

Proposals submitted in response to this RFP are irrevocable for the latest of the following: 180 days following the closing date for submission of proposals, best and final offers (if requested), or the date any protest concerning this RFP is finally resolved. This period may be extended at the Procurement Representative's request only with the Contractor's written agreement.

1.10 RFP Revisions

If revisions to the RFP are necessary prior to the due date for Proposals, the Procurement Representative shall provide addenda to all prospective Contractors that were sent this RFP, or which are otherwise known by the Procurement Representative to have obtained this RFP. In addition, addenda to the RFP will be posted on <https://www.rfpdb.com>. It remains the responsibility of all prospective Contractors to check all applicable websites for any addenda issued prior to the submission of Proposals. Addenda made after the due date for Proposals will be sent only to those Contractors that submitted a timely Proposal and that remain under award consideration as of the issuance date of the addenda.

Acknowledgment of receipt of all addenda to this RFP issued before the Proposal due date shall be included in the Transmittal Letter accompanying the Contractor's Technical Proposal. The acknowledgement of the receipt of addenda to the RFP issued after the Proposal due date shall be in the manner specified in the addendum notice. Failure to acknowledge receipt of an addendum does not relieve the Contractor from complying with the terms, additions, deletions, or corrections set forth in the addendum, and may cause the Proposal to be deemed not responsive for award.

1.11 Cancellations

Equus reserves the right to cancel this RFP, accept or reject any or all Proposals, in whole or in part, received in response to this RFP, to waive or permit the cure of minor irregularities, and to conduct discussions with all qualified or potentially qualified Contractors in any manner necessary to serve the best interests of Equus. Equus also reserves the right, at its sole discretion, to award a Contract based upon the written Proposals received without discussions or negotiations.

1.12 Expenses

Equus will not be responsible for any costs incurred by any Contractor in preparing and submitting a Proposal, in making an oral presentation, in providing a demonstration, or in performing any other activities related to submitting a Proposal in response to this solicitation.

1.13 Protests/Disputes

Any protest or dispute related, respectively, to this solicitation or the Contract shall be subject to the provisions of Res-Care, Inc.'s Arbitration Policies, as they are supporting this Equus RFP.

1.14 Contractor Responsibilities

The successful Contractor shall be responsible for rendering products and services for which it has been selected as required by this RFP. All subcontractors, if any, shall be identified and a complete description of their role relative to the Proposal shall be included in the Contractor's Proposal.

If a Contractor that seeks to perform or provide the products/services required by this RFP is the subsidiary of another entity, all information submitted by the Contractor, such as but not limited to, references, financial reports, or experience and documentation (e.g. insurance policies, bonds, letters of credit) used to meet minimum qualifications, if any, shall pertain exclusively to the Contractor, unless the parent organization will guarantee the performance of the subsidiary. If applicable, the Contractor's Proposal shall contain an explicit statement that the parent organization will guarantee the performance of the subsidiary.

While experience and documentation of a Contractor's parent company may be used to satisfy minimum qualifications, a parental guarantee of the performance of the Contractor under this Section will not automatically result in crediting the Contractor with the experience and/or qualifications of the parent under any evaluation criteria pertaining to the actual Contractor's experience and qualifications. Instead, the Contractor will be evaluated on the extent to which Equus determines that the experience and qualifications of the parent are transferred to and shared with the Contractor, any stated intent by the parent in its guarantee of performance for direct involvement in the performance of the Contract, and the value of the parent company's participation as determined by Equus.

1.15 Mandatory Contractual Terms

By submitting a Proposal in response to this RFP, the Contractor, if selected for award, shall be deemed to have accepted the terms and conditions of this RFP and the Contract. The Contract shall reflect the requirements and provisions of the RFP. Any exceptions to this RFP shall be clearly identified as such in the Executive Summary of the Technical Proposal. The volume and severity of exceptions to the terms of the RFP, will be considered in the evaluation process, and may be grounds for finding a Contractor not reasonably susceptible for award.

1.16 Compliance

By submitting a Proposal in response to this RFP, the Contractor, if selected for award, agrees that it will comply with all federal, State, and local laws applicable to its activities and obligations under the finalized Contract.

1.17 Confidentiality

This RFP, plus any other documents released, information provided, discussions, etc., as part of the selection process, are strictly confidential and should not be divulged to anyone who is not directly involved in preparation of the response. Additionally, all information within this

proposal or gained during the RFP or other processes will remain confidential by the vendor. No information or publicity will be allowed to any third party unless specific written authorization is obtained from Equus.

It is a condition of this RFP that the information provided herein is for the purpose of allowing vendors to submit proposals to Equus. It may not be used in any other context nor revealed to any other party not directly involved in the submission of a proposal in accordance with the terms of the specification.

2.0 CONTRACTOR QUALIFICATIONS

2.1 Past Performance

Contractor must have a minimum of five (5) years of experience providing an Online Learning Library System.

3.0 SCOPE OF WORK

3.1 Requirements for Equus Online Learning Library System to enhance current and future employee and job seeker/client learning offerings.

This system will provide Equus with enhanced service capabilities as part of its standard package of jobseeker and staff development tools. As a workforce services provider in 32 states, Equus is seeking enhanced tools and technology to support participants we serve and our ability to meet or exceed program goals and contractual obligations for skill enhancement and workforce preparation. This system will also provide opportunities for Equus employees to access learning content to support their professional development and career growth.

Equus' current Learning Management System content is provided by Carahsoft on their LinkedIn Learning platform. Equus also has a contract with Essential Education for participant access to specific types of training. This RFP requires the submitted proposal to integrate with any current LMS system(s) and be Single Sign On compatible to provide a seamless user experience for accessing content.

The system must be cloud based and accessible via multiple devices and platforms both online or offline. Content must be updated on a continual basis, be intuitive to navigate, provide learning pathways by industry or occupation (and/or the ability to quickly and easily bundle courses into learning pathways) and be available in multiple languages. There are to be on-demand courses to assist in the preparation of professional certification exams and to earn continuing education units (CEUs) for industry recognized programs.

3.1.1 Billing/Payment Terms & Requirements

Vendors must respond to the price component of this RFP as to the following:

- Software Acquisition and Installation
- Implementation Services
- End User Training
- Ongoing Product Support

All prices shall be consistently in US dollars and all unit prices, charges and totals should be inclusive of tax.

3.1.2 Other Information

Proposals should describe any additional value-added services not otherwise mentioned in the Contractor's response, to include product differentiators. General information, which is not specifically requested, should be attached separately and clearly labeled "Supporting Material".

3.2 System Interfaces

The objective of this Online Learning Library System RFP is to select an appropriate solution to augment current service offerings. The chosen solution will integrate with Equus' current LMS platform.

3.3 Technical Environment

The current Technical Operating Environment

- Mix of Personal Computers (Manufacture & Models)
 - Minimum Requirements Expected.
- Directory Services – AZURE AD.
- Standard Browsers preferred (Edge, Chrome).
- Limited to No local install components and Plugins required.
- Detail local client requirements.
- Client based security (Web Content Filtering)
- Public access provided via Broadband.
- Public access provided via broadband service.

3.4 Office Automation

The standard office automation product of Equus is Microsoft Office 365. Therefore, the new Online Learning Library System needs to be compatible with the Microsoft Office 365 suite (Microsoft AZURE)

3.5 Projected User Licenses

Equus Workforce Solutions

Total Projected Annual User Licenses	20,000
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4. SYSTEM SCOPE

The system functionalities that Equus is looking for is categorized into the following:

Online Learning Library System

- Web-Based Access
- ADA accessible and compliant
- HIPAA and PII Compliant Storage
- Compliant with International Data Storage Requirements
- User Administration Capabilities

- Single Sign-On Compatible
- Licensing for up to 20,000 Users and Scalable for Growth
- User Training and Product Support
- Mobile Accessible
- Unique Online Learning Library
- High-Quality Interactive Content
- Multiple Language Support
- Certification and Continuing Education Programs
- Insights-Based Curation
- Data-Based Content Roadmap
- Unlimited User Access to Online Content
- Task-Based Learning
- Video-Based Training
- Downloadable Exercise Files
- Learner Management Dashboard with Engagement Metrics and Reporting Capabilities
- Printable Certificates of Completion
- Customizable Learning Paths

5. SYSTEM REQUIREMENTS

5.1 Technical Requirements-each contractor responding to this RFP must complete and submit, with their technical proposal, the forms below.

Note:	
SD – Standard	Requirement is standard to application software no modification needed.
MC – Moderate Change	Application software will satisfy this requirement with moderate modification (to be accomplished within two days)
SC – Significant Change	Significant customization (beyond two days) is needed to satisfy the requirement.

No.	Requirement Description	SD	MC	SC	Comments
General					
	Application Integration Same Look and Feel Single Administration Single Programming Language (Excellent integration means that the user feels like they are using applications from a single environment.)				
	Web Enabled Application (Application runs on Internet environment)				
	Ease of Use 1. Intuitive Interface 2. Online Help 3. Non-modal screen navigation (User-friendly. System should use standard Windows icons, layout and make extensive use of shortcut features. It should have context sensitive help, and wizard-like natural language query.)				
	Support for centralized component based environment (single tier deployment environment).				
	Multiple-User Access (Ability to provide concurrent system access to multiple users and it should not cause file or record deadlock. Provide fast response time to all concurrent users.)				
	The system should be able to cope with or should be:				

No.	Requirement Description	SD	MC	SC	Comments
	Compliant with International Data Storage and Transmittal Standards				
	Browser-Based User Interface				

5.2 Target System Performance

Note:	
SD – Standard	Requirement is standard to application software no modification needed.
MC – Moderate Change	Application software will satisfy this requirement with moderate modification (to be accomplished within two days)
SC – Significant Change	Significant customization (beyond two days) is needed to satisfy the requirement.

No.	Requirement Description	SD	MC	SC	Comments
	Ability to Handle Volumes (The system should be able handle the volumes as projected in <i>Section 3.5, Projected User Licenses</i> , without any degradation in system speed.)				
	24 Hour Access (The system should provide 24-hour access. Day-end activities should not interfere with users’ access to the system. The system should allow for online backups and other housekeeping activities.)				
	Performance Degradation (There should be no noticeable degradation in system performance for up to 20,000 users.)				

6. VENDOR REQUIREMENTS

6.1 Supplier Profile

All vendors must give a comprehensive profile of their organization in the following format and order.

6.1.1 Organization

‘Organization’ concerns the structure and size of the company both in terms of its head office and other worldwide regional locations.

- Please provide information as to whether the organization is independent or part of a larger conglomerate. If the latter, please provide details on the holding company.
- Please provide corporate mission statement and strategic direction of the product. Also, long term plan for addressing emerging technology.
- Please provide information as to whether the organization is the package manufacturer, reseller or value-added resellers (VARs). If the latter two, please also provide details of the company.
- Please provide information of any company that merged with or purchased by the organization.
- Please provide information of any alliance or affiliation that with which the organization partners (e.g., tool or equipment supplier, standard groups, industry groups).
- Please provide information of the organization statistics (e.g., geographic distribution, market share, reputation, company highlights, etc.).

6.1.2 Product

‘Product’ concerns some basic information on the products of the company:

- All products being marketed
- How long the products have been in the market
- Compatibility of different products marketed
- By whom and where was the product developed
- Platform the products are running
- Connectivity strategy for product proposed

6.1.3 Location

‘Location’ concerns the location and size of operations at the head office and any regional offices.

For each location please state:

- Number of employees by function (technical and non-technical).

- Whether the offices are wholly owned subsidiaries of the main head office or if it is a third-party managed operation (VARs).
- Also indicate the office from where an implementation would be managed.

6.1.4 Experience

‘Experience’ concerns the relative experience vendor has in terms of an implementation of this size related to the business activity and distance from the most local regional office.

6.1.5 Reference Sites:

‘Reference sites’ concerns the location and relative suitability of sites where the package is already implemented and is currently operational. Please provide:

- Number of reference sites by geographic area
- Other locations

For each reference sites, please provide the following:

- Client company name
- Client contact person
- Client address (street, city, country, post code), email address, telephone and fax number
- Client number of employees
- Client industry
- The package or module that was delivered
- The date of the delivery
- Demonstrated successes (i.e. user engagement rates, courses completed)

For reference locations whose software applications most closely match Equus’ requirements, please outline the business activities carried out at these sites and their use of your package. Please indicate the period of time each site has been in operation with the designated package and the degree of customization that was required.

Also discuss how or if your company engages current customers through regular communications or convenings to identify and share best practices, share product updates etc.

6.1.6 Security Practices

Please provide information on security practices, frameworks and certification achieved for the service. Description of the cloud provider services is helpful to understand the technologies employed.

Data Encryption: What are the encryption solution proposed to support encryption of sensitive/confidential information.

Compliance: Plan to ensure that the execution of the contract, included in the solution, meets compliance with all applicable legal and regulatory requirements.

Security Certifications: Please provide current security certifications or credentials.

Incident Response Time Requirements: Incident response time requirements.

Storage Standards: Clarify your storage standards. (include how data is stored and protected).

6.1.7 Other Information

Please also provide us with any other information which you see as relevant, specifically any known weakness that the product has in terms of functionality or implementation/training requirements.

6.2 Maintenance and Support

Vendors are required to provide the following information related to the support and maintenance of the proposed solution.

- Options available for support, names and addresses of Agents (if any) in the region.
- Software maintenance charges and the spectrum of activities covered under such maintenance contracts (new release, bug fixes, etc.).
- Software support availability (Help Desk, hotline, etc.) and duration for which they are available.
- Response time to support inquiries from Equus.
- Standard hours during which support will be provided and out of hours support options and costs.
- Uptime guarantees.
- Number of staff in the software support team.
- Frequency at which new versions of the software are released.
- Release date for the first version of the software.
- Release date for the current version of software.
- Release date for the next version.
- Product development plan for the proposed software solution and annual R&D spend.
- Implications of modifications on upgrade, maintaining modification and potential costs.

7.0 IMPLEMENTATION REQUIREMENTS

It is planned that a vendor will be selected by August 24, 2024 and contract negotiation completed by September 24, 2024. It is Equus' intention to commence operational use of the proposed system no later than October 24, 2024. Please use indicative figures for this section.

7.1 Implementation Plan

Vendors should include an implementation plan with a timetable for the implementation of the system, showing the recommended modules to be included in each phase and estimate effort required. The plan must indicate the specific tasks involved and the time frames required (both elapsed and man days). Implementation plan must also indicate the set-up, testing, parallel and live run phases, the checks to be made at the end of each phase and the deliverables from each one.

Clearly state the standard acceptance and testing criteria that is usually employed.

This implementation plan will be refined during initial scoping of the project.

7.2 Project Organization

Provide details of the proposed project structure identifying key individuals, e.g., Project Managers and their roles, including the number and location of proposed analysis/development personnel. Due to the expected impact on the business processes, it is extremely important Equus obtain a thorough understanding of the organizations and individuals proposed for the project and the roles Equus staff would be expected to play. Vendors should provide details of sub-contractors likely to be involved, if any. Indicate the number of full time equivalent staff that will be required.

Provide estimates of the required number of Equus staff to support this project and identify the skills required. Provide details for the following:

- Number of Full Time Equivalent (separate IT and Business) required throughout the duration of the project
- Key roles to be included for business requirements
- Key roles to be included for IT requirements

Provide details of governance roles including:

- Steering committee
- Project management
- Number and frequency of meetings

Provide an estimate of the infrastructure required at Equus for your implementation team if applicable:

- Number of work desks
- Number of telephones
- Number of computers

7.3 Training

As part of the implementation requirements, training needs must also be identified for operating staff and managers. The training needs of the IT staff for ongoing support must also be identified. Please include a training plan, clearly indicating what type of training will be imparted at what phase of the project and where, with due consideration for the remoteness and travel

costs. The vendors must also indicate the number of man-days of training and support provided free of charge.

List the documentation (systems and user manuals) provided with the standard software solutions. Equus will need to see samples of such documentation during the selection process (do not supply with the Proposal).

Implementation costs should cover all efforts required from initiation to post- implementation wrap-up.

8.0 PROPOSAL SUBMISSION DETAILS

8.1 Submission Instructions

The contractor shall submit both the Technical and Financial Responses of the completed proposal to the Procurement Representative listed in Section 1.4 on or before the date noted in Section 1.7 of the RFP. Proposals are to be submitted **via email** to the Procurement Representative with the subject line “Online Learning Library Proposal”.

Detailed instructions as to proposal content and order are provided in Section 11 of this RFP.

9.0 PROPOSAL EVALUATION

As a Contractor to the Federal Government, Equus has adopted FAR 15.301 as guidance for Proposal evaluation. As per the FAR regulation, Equus will evaluate the proposals in alignment with the following:

“(a) Proposal evaluation is an assessment of the proposal and the Contractor’s ability to perform the prospective contract successfully. An agency shall evaluate competitive proposals and then assess their relative qualities solely on the factors and sub-factors specified in the solicitation. Evaluations may be conducted using any rating method or combination of methods, including color or adjectival ratings, numerical weights, and ordinal rankings. The relative strengths, deficiencies, significant weaknesses, and risks supporting proposal evaluation shall be documented in the contract file.

(1) Cost or price evaluation. Normally, competition establishes price reasonableness. Therefore, when contracting on a firm-fixed-price or fixed-price with economic price adjustment basis, comparison of the proposed prices will usually satisfy the requirement to perform a price analysis, and a cost analysis need not be performed. In limited situations, a cost analysis (see [15.403-1\(c\)\(1\)\(i\)\(B\)](#)) may be appropriate to establish reasonableness of the otherwise successful Contractor’s price. When contracting on a cost-reimbursement basis, evaluations shall include a cost realism analysis to determine what the Government should realistically expect to pay for the proposed effort, the Contractor’s understanding of the work, and the Contractor’s ability to perform the contract. (See [37.115](#) for uncompensated overtime evaluation.) The contracting officer shall document the cost or price evaluation.

(2) Past performance evaluation.

(i) Past performance information is one indicator of a Contractor’s ability to perform the contract successfully. The currency and relevance of the information, source of the information, context of the data, and general trends in contractor’s performance shall be considered. This

comparative assessment of past performance information is separate from the responsibility determination required under [subpart 9.1](#).

(ii) The solicitation shall describe the approach for evaluating past performance, including evaluating Contractors with no relevant performance history, and shall provide Contractors an opportunity to identify past or current contracts (including Federal, State, and local government and private) for efforts similar to the Government requirement. The solicitation shall also authorize Contractors to provide information on problems encountered on the identified contracts and the Contractor's corrective actions. The Government shall consider this information, as well as information obtained from any other sources, when evaluating the Contractor's past performance. The source selection authority shall determine the relevance of similar past performance information.

(iii) The evaluation should consider past performance information regarding predecessor companies, key personnel who have relevant experience, or subcontractors that will perform major or critical aspects of the requirement when such information is relevant to the instant acquisition.

(iv) In the case of a Contractor without a record of relevant past performance or for whom information on past performance is not available, the Contractor may not be evaluated favorably or unfavorably on past performance.

(v) The evaluation should include the past performance of Contractors in complying with subcontracting plan goals for small disadvantaged business (SDB) concerns (see [subpart 19.7](#)).

(3) Technical evaluation. When tradeoffs are performed (see [15.101-1](#)), the source selection records shall include—

(i) An assessment of each Contractor's ability to accomplish the technical requirements; and

(ii) A summary, matrix, or quantitative ranking, along with appropriate supporting narrative, of each technical proposal using the evaluation factors.

(4) Cost information. Cost information may be provided to members of the technical evaluation team in accordance with agency procedures.

(5) Small business subcontracting evaluation. Solicitations must be structured to give offers from small business concerns the highest rating for the evaluation factors in [15.304\(c\)\(3\)\(ii\)](#) and (c)(4).

(b) The source selection authority may reject all proposals received in response to a solicitation, if doing so is in the best interest of the Government.

(c) For restrictions on the use of support contractor personnel in proposal evaluation, see [37.203\(d\)](#).

deficiencies, significant weaknesses, and risks supporting proposal evaluation shall be documented in the contract file.

10.0 Selection Criteria

Package selection will be based upon a number of criteria, as detailed below. Contractors are therefore required to consider how their package fits in with the criteria listed and clearly indicate this in their response document.

Selection criteria will be based upon:

Functional Fit

The functional fit between the package and the business needs, as documented in the Statement of User Requirements and its availability for implementation. This will also take into account the ease of use of the package, the quality of the documentation, the extent of the modifications required and the readiness and flexibility of the vendor to handle customization and adapt to any future changes in the business.

Supplier Fit

The quality of management, technical staff, financial and organizational stability of the company. Contractual arrangements, current customer base and the quality of the vendor's support (i.e., assistance/troubleshooting, training, and consulting) will also be considered. Customization should be carried out by the vendors in such a manner that it can be incorporated into future releases of the software. Vendor presence and/or ability to operate in countries where Equus is operating will be a definite advantage.

Technical Fit

The package will be technically measured based on its seamless online connectivity to the application systems identified in the *System Interface* section and its flexibility and support on open architecture so that any future need to interface with other system would not cause any problem. It will also be evaluated on its stability of its platform, robustness of its database, and adherence to defined security and control requirements, audit requirements and target system performance.

Cost

The overall costs of implementing the proposed solution for up to 20,000 named users. A cost-effective solution that seeks to minimize overall cost.

Implementation Strategy and Risk

Solutions that can be implemented quickly, are flexible and are able to meet present and future needs. A proposed implementation approach seeks to minimize risk. The grading matrix used to help evaluate the RFP will be as follows:

Criteria	Points
Part I: FUNCTIONAL FIT	25
Part II: SUPPLIER FIT	25
Part III: TECHNICAL FIT	25
Part IV: COST	25
CORPORATE QUALIFICATIONS AND EXPERTISE	30
PROJECT MANAGEMENT - PROPOSED PROJECT PLAN AND TIMELINES	50
SUPPORT	20
GRAND TOTAL	200

11. PROPOSAL RESPONSE FORMAT

This section outlines the format in which the suppliers are required to respond to this invitation. All suppliers will be required to provide the information as specified. Any other information that may be relevant to Equus' decision-making process must be supplied as addenda.

Proposals will be submitted in three separate sections:

- 1) Technical Proposal
- 2) Cost Proposal
 - Compliance to User Requirements (see Forms at Sections 5.1 and 5.2)
 - Compliance to Implementation Requirements (see Section 7)
 - Contracts
- 3) Addenda (if any)

11.1 Technical Response

The Technical Response shall include all items detailed below. In addition to the following instructions, responses in the Contractor's Technical Response must be able to be directly mapped to the RFP.

The Technical Response shall include the following documents and information in the order specified as follows:

- Title Page and Table of Contents
- Claim of Confidentiality
- Transmittal Letter, including acknowledgement of addenda to the RFP, if any
- Executive Summary, including details of exceptions to the RFP requested, if any
 - Name of the package(s) being offered, version number, etc.
 - Broad functional fit to the specifications in the Statement of User Requirements
 - Hardware platforms recommended and alternatives.
 - Application environment
 - Number of sites where package is implemented. Number of sites for the version proposed.
 - Approximate cost of implementation broken down by:
 - Software Acquisition and Installation
 - Implementation Service
 - General Project Cost (Consulting, Travel Expense, etc.)
 - Installation
 - Customization
 - Maintenance and Support
 - Other Costs
- Supplier Profile – Contractor should detail in this section all information pertaining to the vendor requirements summarized in *Section 6*.
- Minimum Qualifications Documentation, including information about parent company guaranteeing performance of the Contractor, if applicable

- Technical Response to the Requirements
- Screen shots, videos and other product documentation including demo login.
- Proposed Implementation Plan (include implementation plan, cost and timeline)
- Insurance requirements

11.2 Financial Proposal

The Proposal shall contain a Title Page with the Contractor's name, due date, and Solicitation number. In addition, all price information must be included in similar format to that specified below. Proposals must respond to the price component of this RFP to the following:

- Software Acquisition and Installation
- Implementation Services
- End User Training
- Ongoing Product Support

Further detail is below:

It is the vendor's responsibility to highlight all costs related to the implementation of their solution. Key components that are required but not quoted for will be the responsibility of the supplier.

It is expected for the vendor to provide the application software (including third party software wherever applicable), database integration services and consulting.

Each heading should be expanded as required to show each item and clearly identify what is included within the associated charge. The charges should be separated into capital cost, one-time costs and ongoing charges.

It is expected that all charges and costs applicable to this proposal will be included in this section. Including, for example: handling, transportation, installation, training, maintenance and support, software upgrade, tools, travel, accommodations, and any other item that could be interpreted as the real cost of procurement and any on-going expenses due to the vendor.

Software costs should highlight the difference between standard core licenses, modules, and enhancement costs and third-party software licenses. Wherever a vendor is supplying items of a different manufacturer, the manufacturer and model numbers must be indicated.

In this section, vendors are requested to provide details on the equipment required as a platform for the proposed system. Equus requires that vendors provide estimates for the capacity and costs of all equipment for the proposed system.

Any charges applying to the proposal should be included with a full and itemized description.

All costs and prices quoted in the proposal are assumed to be valid until implementation is completed.

Include information about invoicing capabilities, required payment terms, and sources of payment accepted (e.g. credit card, check, third party etc.).

11.2.1 Compliance to User Requirements (see Forms at Sections 5.1 and 5.2)

Vendors should set out clearly in their proposal all information requested. The proposal should follow the same numbering system as this RFP. Vendors should respond to each requirement with a SD (Standard), MC (Moderate Change), or SC (Significant Change) answer. The definitions are as follows:

SD Requirement is standard to application software no modification needed.

MC Application software will satisfy this requirement with moderate modification (to be accomplished within two days)

SC Significant customization (beyond two days) is needed to satisfy the requirement.

Where a specific requirement cannot be fully met, or an alternative solution is proposed, comments should be included (e.g., the cost of basic tailoring, how much time is needed, etc.).

11.2.2 Compliance to Implementation Requirement

Vendor should detail in this section all information pertaining to the vendor requirements summarized in *Section 7*.

11.2.3 Contracts

The vendors must indicate nature of contracts and agreements they are willing to enter into. The information to be provided includes:

- Sample contracts
- Payment terms - details of payment settlement options
- Period for which the price quotes will hold
- Guarantees against the system non-performance
- Penalty clauses
- Any other vendor constraints

12.0 TIMELINE

06-07-2024 RFP Released

06-14-2024 Intent to Respond to RFP Due (5:00 PM Eastern Time)

06-19-2024 Deadline to Submit Questions for Answers (5:00 PM Eastern Time)

06-28-2024 Proposal Submission Deadline (5:00 PM Eastern Time)

08-24-2024 Estimated Award

Equus retains the right to amend this schedule as it sees fit.