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ITN 16-01
Customer Service and
Records Administration Services

Solicitation Conference

Section 1 - Introduction

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- For more than 25 years, the Florida Prepaid College Board ("Board") has helped families plan and prepare to meet future postsecondary education expenses.
- The Board has determined that it is in the best interests of the Board's Programs to require that all future records administration services, including all customer service responsibilities for the Prepaid Plan, the Savings Plan and the Foundation Plan be provided pursuant to one contract.
- Respondents are bidding to provide all systems and services as detailed in the Scope of Services (Appendix A) and the Business Rules (Appendix B) under a Contract (Appendix C) with the Board for the following:
 - Stanley G. Tate Florida Prepaid College Program
 - Florida 529 Savings Plans
 - Florida Prepaid College Foundation

Section 1 - Introduction

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- To be considered, Respondents must have at least five consecutive years of experience providing customer service and records administration services for both prepaid college programs and college savings programs. A Respondent may include a Subcontractor's or Related Entity's experience to satisfy this requirement.
- The Board seeks to negotiate the Contract in Appendix C for the provision of customer service and records administration services resulting from the ITN. The Board intends to use the Contract in Appendix C and reserves the right to modify existing language and to consider additional proposed language by the Respondent as it may arise from negotiations.
- The resulting contract is anticipated to start on July 1, 2017 and continue through June 30, 2024, which includes a two-year transition period, and may be extended for up to five additional years (i.e., through June 30, 2029). See the Contract in the [Appendix C](#) for additional terms and conditions.

Section 2 - Schedule

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ACTION	DATE & TIME	ADDRESS
ITN Issued	October 5, 2016	
*Solicitation Conference	October 17, 2016 2:00PM EDT	1801 Hermitage Boulevard Tallahassee, FL 32308
Written requests for clarification about the ITN are due to the Board	October 24, 2016 2:00PM EDT	ITNinfo.Prepaid@ MyFloridaPrepaid.com
Board responds to written requests for clarification about the ITN on the Vendor Bid System (VBS)	October 31, 2016	
Deadline for written responses to the ITN	December 19, 2016 2:00PM EST	1801 Hermitage Boulevard Tallahassee, FL 32308
*All responses publicly opened at Board office	December 19, 2016 3:00PM EST	1801 Hermitage Boulevard Tallahassee, FL 32308
*Meeting for Validation of Evaluator Scoring at Board office	January 23, 2017 9:00AM EST	1801 Hermitage Boulevard Tallahassee, FL 32308
Negotiation Period	January – April 2017	
*Recommendation for Award meeting	April 2017	1801 Hermitage Boulevard Tallahassee, FL 32308
Notice of intent to award	April 2017	
Anticipated contract start date	July 1, 2017	

Section 3.1 - Official Notices and ITN Revisions

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- The following documents will be electronically posted on the Department of Management Services (DMS) Vendor Bid System (VBS):
 - ITN
 - Written requests for clarification and corresponding responses
 - All notices, decisions, intended decisions, addenda and other matters
 - Amendments to the ITN (If it becomes necessary to revise any part of the ITN).
- The VBS website is myflorida.com/apps/vbs/vbs_www.main_menu. Please utilize the following search criteria to view the official notices and ITN revisions:
 - Agency: State Board of Administration
 - Title: ITN 16-01
- It is the responsibility of prospective Respondents to check the VBS for addenda, notices of decisions, and other information or clarifications to the ITN.

Section 3.3 - Evaluation

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- Step 1: Assessment of Mandatory Requirements
 - Company identity and signature on Tab 1 – ITN Acknowledgment
 - Affirmation of the three criteria and signature on Tab 2 – Qualifications Questionnaire
 - Completion of, and signature on, the Cost Response
- Step 2: Evaluation of Responses
 - Technical Responses may be awarded up to the maximum points assigned here:

Evaluation Criteria – Technical Response Scoring	Points
Section 5.1, Tab 6 – Organization Overview	75
Section 5.1, Tab 7 – Scope of Services	500
Section 5.1, Tab 8 – Performance Measurement	75
Technical Response Score	650

Section 3.3 - Evaluation

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- Step 2: Evaluation of Responses (cont)
 - Cost Responses may be awarded up to the maximum points assigned here:

Topic	Points
Section 6.1 – Prepaid Plan	240
Section 6.1 – Savings Plan	85
Section 6.1 – Foundation	15
Section 6.1 – Business Analyst	5
Section 6.1 – Programmer	5
Cost Response Score	350

- Step 3: Notification of the Shortlist
 - The ITN Administrator will post notice of the shortlist pursuant to Section 3.1 and may provide individual notice to each Respondent on the shortlist.

Section 3.4 - Negotiation

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- During the Negotiation Phase, the Board intends to initially negotiate concurrently with the Respondents on the shortlist and may include:
 - Site Visits and Presentation
 - Supplemental Response
 - Additional or revised responses to the ITN, including addressing services, prices or conditions offered by any other Respondent.
 - Detailed written responses addressing specified topics.
 - Revised Cost Responses, including a written best and final offer.
 - Reference Checks

Section 3.5 - Notice of Intent to Award

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- When negotiations have been completed, the Board will award the contract to the responsive and responsible Respondent that the Board determines will provide the best value to the Board.
- The Board will post its Notice of Intent to Award or its Notice to Reject All Response.

Section 4 - Submission of Requests for Clarification

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- The Respondent may submit requests for clarification regarding the ITN
 - 4.1 RESPONSE FORMAT AND CONTENT
 - Complete the Request for Clarification form
 - 4.2 FILE FORMAT
 - Submitted as a Microsoft Word document
 - 4.3 DELIVERY
 - Submitted via email to the ITN Administrator at ITNinfo.Prepaid@MyFloridaPrepaid.com. The subject line should reference "ITN 16-01"
 - 4.4 PUBLIC POSTING
 - The Board will post responses using VBS

Section 5 - Submission of Technical Response

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- Each Respondent shall prepare its response simply and economically to provide a straightforward, concise delineation of the Respondent's capabilities to satisfy the requirements of the ITN
- 5.1 Response Format and Content
 - The Respondent shall use the following tab structure to organize its Technical Response.

Tab #	Description
1	Invitation to Negotiate Acknowledgment
2	Qualifications Questionnaire
3	Tie Breaking Certification
4	Technical Response Checklist
5	Administrative Questionnaire
6	Organization Overview
7	Scope of Services
8	Performance Measurement

Section 5 - Submission of Technical Response

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- 5.2 FILE FORMAT
 - All content submitted must be included on the flash drives and may not direct the user to any external web-based locations.
 - Documents – PDF or any Microsoft Office Suite format
 - Images – JPG or PNG
 - Video – MP4 or MOV
 - Audio – MP3

- 5.3 NUMBER OF COPIES
 - Respondents shall deliver:
 - one unbound hardcopy
 - five bound copies
 - one complete electronic copy of all materials submitted on a USB flash drive.

- 5.4 PACKAGING
 - All content pertaining to the Technical Response must be placed in a sealed box and clearly marked as “Technical Response”.

Section 6 - Submission of Cost Response

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- 6.1 RESPONSE FORMAT AND CONTENT
 - Each Respondent shall complete the Cost Response form
- 6.2 NUMBER OF COPIES
 - The Respondents shall deliver one unbound hardcopy of the Cost Response. The Respondent shall not submit an electronic copy of the Cost Response.
- 6.3 PACKAGING
 - The Cost Response must be placed in a sealed envelope and clearly marked as “Cost Response”.

Section 7 – ITN Considerations

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- 7.1 LIMITATIONS ON CONTACTING BOARD PERSONNEL AND OTHERS
- 7.2 NEWS RELEASES
- 7.3 ONLY ONE RESPONSE
- 7.4 TIMELY RESPONSE REQUIRED
- 7.5 RESPONSE TENURE
- 7.6 COST OF DEVELOPING AND SUBMITTING RESPONSES
- 7.7 PUBLIC RECORDS AND TRADE SECRETS
- 7.8 LEGAL REQUIREMENTS
- 7.9 PROTESTS AND DISPUTES
- 7.10 REJECTION OF RESPONSES
- 7.11 BEST INTERESTS OF THE BOARD