

The State of Oregon  
Secretary of State's Office  
*Request for Proposals (RFP)*



*MDM (Misinformation, Disinformation, and Mal-information)  
Analysis Platform Services*



**RFP Single Point of Contact**

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**Purchaser:** Phillip Andrews, CPPB  
**Phone:** 971.600.6269  
**Email:** [Phillip.Andrews@sos.oregon.gov](mailto:Phillip.Andrews@sos.oregon.gov)

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## SECTION 1: OVERVIEW

### 1.1 OVERVIEW AND PURPOSE

#### 1.1.1 About the SOS

The Oregon Secretary of State is one of three constitutional offices created at statehood. As an independent constitutional officer, the Secretary of State answers directly and solely to the people of Oregon.

The Oregon Secretary of State's Office (SOS) comprises seven distinct divisions:

- i. Audits Division;
- ii. Business Services Division;
- iii. Corporation Division;
- iv. Elections Division;
- v. Human Resources Division;
- vi. Information Systems Division; **and**
- vii. State Archives Division.

The resulting Contract is for the benefit of the Elections Division.

To learn more about our SOS and our respective divisions, please visit our webpage: <https://sos.oregon.gov/Pages/divisions.aspx>.

#### 1.1.2 RFP Purpose

The purpose of this RFP is to contract with a vendor to help provide a suite of products to identify and mitigate harmful information online as it relates to elections (mis-, dis-, and mal-information, or "MDM").

Currently, Oregon Elections Division (OED), our county clerks (CC), and eligible voters are being targeted by mis, dis, and mal information (MDM). The MDM work is often targeted at mis information circulating on the dark web, underground web, and social media pages before the election division and county clerks know about the MDM.

Currently, and over the last two years, OED and CC have been targeted with a significant increase in burdensome public records requests, in many cases seemingly fueled by MDM on the web, dark web, and spread on social media. False and unsubstantiated claims are frequently disseminated or amplified via web-based vectors. In order to effectively promote accurate information regarding election administration and combat MDM, the OED and CC must have the capability to detect and analyze MDM. OED and CC currently do not have capacity or technology support to track, follow, and trace all of the threats.

For more details regarding the Scope, see **Section 1.5** and **Attachment A – Solution Requirements (Informational)**.

For more information regarding Proposal submittals, see **Section 3.2**.

## 1.2 DEFINITIONS

The following definitions apply to this RFP:

Acronym/Term	Definition
<b>Addendum</b>	“Addendum” or “Addenda” has the meaning in OAR 137-046-0110 but will be processed in OregonBuys as a “Bid Amendment.”
<b>Bid Amendment</b>	“Bid Amendment” means “Addendum” as that term is defined in OAR 137-046-0110.
<b>Bid Opening Date</b>	“Bid Opening Date” means the date and time all Proposals are due and must be submitted in OregonBuys.
<b>County Clerk (CC)</b>	“County Clerk” or “CC” means the elections official of a given Oregon County.
<b>Evaluation Committee</b>	“Evaluation Committee” means the group of Evaluators that will evaluate and assign scores to the Service Proposal.
<b>Evaluator</b>	“Evaluator” means an individual SOS representative serving on the Evaluation Committee.
<b>Functional Requirements</b>	“Functional Requirements” means the business and end-user functionality that SOS requires of the Solution.
<b>MDM</b>	<p>“MDM” means Mis-, Dis-, Malinformation, which is defined as information activities with the following categories:</p> <ul style="list-style-type: none"> <li>• <b>Misinformation</b> is false, but not created or shared with the intention of causing harm.</li> <li>• <b>Disinformation</b> is deliberately created to mislead, harm, or manipulate a person, social group, organization, or country.</li> <li>• <b>Malinformation</b> is based on fact, but used out of context to mislead, harm, or manipulate.</li> </ul>
<b>Non-Functional Requirements</b>	“Non-Functional Requirements” means the technical features required to ensure back-end functionality of the Solution.
<b>OED</b>	“OED” means the Oregon Elections Division of the SOS.
<b>OregonBuys</b>	“OregonBuys” means the e-procurement system used by SOS to administer this RFP and that will be used by Proposer for submitting its Proposal.

<b>Proposer</b>	“Proposer” means an actual or potential entity that submits a Proposal in response to this RFP.
<b>RFP</b>	“RFP” means this Request for Proposals.
<b>Round 1</b>	“Round 1” means the Proposer submittal and SOS evaluation of written Proposals.
<b>Round 2</b>	“Round 2” means the Proposer demonstration and SOS evaluation of the Solution.
<b>SME</b>	“SME” means subject matter expert.
<b>Solution</b>	“Solution” means the sum total of all technology and service components that the system comprises.
<b>SOS</b>	“SOS” means the State of Oregon acting by and through the Secretary of State’s Office.

### 1.3 SOLICITATION SCHEDULE

The following schedule represents the major milestones for this RFP and is subject to change via RFP Addendum. All dates and times after “*Notice of Intent to Award*” are estimates.

<b>RFP Milestone</b>	<b>Date &amp; Time (all in PT)</b>
<b>Voluntary Pre-Proposal Conference</b>	August 30, 2023, at 2:00 pm.
<b>Proposer Questions Due</b>	September 7, 2023, by 5:00pm.
<b>SOS Release of Q&amp;A</b>	September 12, 2023.
<b>Request for Changes Due</b>	September 14, 2023, by 5:00pm.
<b>Bid Opening Date</b>	September 21, 2024, by 5:00pm.
<b>Evaluations</b>	<b>Start:</b> September 27, 2023. <b>End:</b> October 4, 2023.
<b>Solution Demonstrations (One day per Proposer)</b>	<b>Start:</b> October 5, 2023. <b>End:</b> October 12, 2023.

<b>Notice of Intent to Award</b>	October 13, 2023.
<b>Negotiations Complete</b>	October 20, 2023.
<b>Contract Signed</b>	October 27, 2023.

## 1.4 OREGONBUYS

### 1.4.1 Overview and Registration

This RFP, including all amendments, attachments, and exhibits is posted on OregonBuys at <https://oregonbuys.gov>. RFP documents will not be mailed. Current and correct registration information is the sole responsibility of the registered party. SOS accepts no responsibility for missing or incorrect information.

### 1.4.2 OregonBuys Assistance

Parties needing assistance with OregonBuys may contact the OregonBuys Helpdesk by telephone at 1.855.800.5046 or by email at [support.oregonbuys@oregon.gov](mailto:support.oregonbuys@oregon.gov).

## 1.5 SOLICITATION SCOPE AND OBJECTIVES

### 1.5.1 Scope of Work

The Elections Division is seeking a qualified Proposer to provide a suite of products to identify, advise, and methods to combat harmful MDM information online. This includes:

- Media monitoring and threat detection services to offer a comprehensive view of the landscape;
- Providing early notification systems to identify MDM and target MDM activity; and
- Guidance on effective measures to ensure the most effective possible promotion of accurate information.

The Proposer solution must provide a means to advance the presentation of factual material and counter the erosion of trust in public institutions and election systems. The successful Proposer will provide potential MDM tracking solutions for the SOS election team to better understand MDM trends, narratives, and potential opportunities to combat MDM, to include, but not necessarily be limited to:

- Monitoring of threats, mentions in social media, and spread of MDM;
- Configurable alerts (e.g., adjustable timing or keyword-based) related to emerging narratives containing harmful content and MDM;
- Analysis of the origin of threats and the spread of MDM
- Provide insights on how to combat MDM;
- Regular and configurable reporting on threats, key issues, and MDM; **and**
- Ability to comply with SOS-defined standards to ensure ethical, compliant, and proper use of solution.

The Proposer shall provide real-time information regarding threats to property and potential threats to life. This information will then be shared according to SOS-defined policies for escalation to law enforcement and potential notification of affected parties.

**Deliverable #1: MDM Monitoring & Training:**

The selected Proposer shall review social and online media for MDM while also training SOS staff on how to use the solution.

The selected solution must perform 24/7 monitoring during special circumstances agreed upon between the selected Proposer and SOS.

**Deliverable #2: MDM Monitoring & Reports:**

The selected Proposer shall provide SOS with a weekly MDM report by 14:00 Pacific Time on Fridays with potential MDM narratives, threats, and recommended countermeasures.

1. Proposer shall identify potential MDM narratives and threats across social media and online.
  - a. Proposer shall define narratives as at least more than one piece of content that shares a similar rhetorical objective that pose a potential risk to electoral integrity in Oregon.
  - b. Proposer shall include analysis on potential MDM narratives and threats, which may include but are not limited to:
    - i. Risk level posed by MDM narratives and threats to Oregon's election system and integrity.
    - ii. Trends related to MDM narratives and threats observed.
  - c. Proposer shall include recommended countermeasures that SOS can take to address MDM narratives and threats, which may include but are not limited to:
    - i. Public messaging that promotes factual information to mitigate the risk posed by MDM narrative.
    - ii. SOS and Proposer reports on MDM threats sent to social media platforms for violating community guidelines and/or policies. This will be determined on a case-by-case basis.

**Deliverable #3: MDM Alerts**

Proposer shall provide SOS and relevant stakeholders with alerts related to MDM topics agreed upon between the vendor and the election division.

1. SOS will provide the selected Proposer with a list of relevant stakeholders, and SOS will coordinate with Proposer to identify preferred means of communication, which may include but are not limited to:
  - a. Email
  - b. Text message
  - c. Dashboard
  - d. Regular report meetings and updates
2. The selected Proposer shall alert SOS of any identified potential threats to life and or property.



Proposer's solution should substantially meet the requirements set forth in **Attachment A – Solution Requirements (Informational)**.

### **1.5.2 Goals and Objectives**

- i.** Promote accurate information;
- ii.** Increase trust in elections processes and integrity;
- iii.** Provide Oregonians with a sense of security related to Oregon's vote by mail system and elections processes and administration;
- iv.** Detect MDM and threats to life or property;
- v.** Analyze trends;
- vi.** Counter erosion of trust in our democratic institutions and agencies;
- vii.** Share relevant and urgent information with local stakeholders like county clerks, FBI, and State Police partners;
- viii.** Create a strategy to combat MDM trends;
- ix.** Monitor growth and information sharing trends;
- x.** Share relevant information with state partners throughout the country; **and**
- xi.** Collect real time data.

### **1.5.3 Key Measures of Success**

- i.** Receiving notifications of MDM topics before they are published by mainstream broadcasting and online media;
- ii.** Solution identifies or can be used to identify root cause/source of major MDM topic(s).
- iii.** Solution accurately identifies MDM trends;
- iv.** Proposal addresses how the solution adheres to best practices for reporting standards and identifies how standards are monitored to remain current; and
- v.** Building key partnership to promote transparency and build stakeholder and partner trust.

## **SECTION 2: SOLICITATION PROCESS**

### **2.1 PUBLIC NOTICE**

The RFP and its attachments are published in OregonBuys at <https://OregonBuys.gov>.

Modifications to this RFP will be issued by SOS as RFP Addenda and published as Bid Amendment(s) in OregonBuys. Proposers are solely responsible for checking OregonBuys to determine whether or not any Bid Amendments have been issued. Bid Amendments are incorporated into the RFP by this reference.

### **2.2 VOLUNTARY PRE-PROPOSAL CONFERENCE**

A voluntary Pre-Proposal Conference will be held at the date & time provided in **Section 1.3 (Solicitation Schedule)**.

The purpose of the Pre-Proposal Conference is to provide Proposers clarity on the RFP process and Project scope/objectives. The intent is to ensure barriers are removed for Proposers and that their relevant questions are answered through an open dialogue between the industry and SOS.

The Pre-Proposal Conference agenda is as follows:

Topic	Duration
<b>Introduction</b>	5 minutes
<b>RFP &amp; Proposals Overview</b>	10 minutes
<b>Scope Overview</b>	15 minutes
<b>Open Q&amp;A</b>	30 minutes

The Pre-Proposal Conference will be held virtually via a Microsoft Teams Meeting. Details are provided below:

## Microsoft Teams meeting

**Join on your computer, mobile app, or room device:**

[Click here to join the meeting](#)

Meeting ID: 285 767 518 709

Passcode: F4PQ27

[Download Teams](#) | [Join on the web](#)

**Or call in (audio only)**

[+1 503-446-4951,,524248334#](#) United States, Portland

Phone Conference ID: 524 248 334#

[Find a local number](#) | [Reset PIN](#)

[Learn More](#) | [Meeting options](#)

*NOTE: Statements made by the SOS at the Pre-Proposal Conference are not binding upon the SOS unless such statements are confirmed by a written RFP Addendum.*

## 2.3 QUESTIONS, REQUESTS FOR CLARIFICATION, AND PROTESTS

### 2.3.1 [RFP Q&A](#)

All inquiries regarding all aspects of the RFP must be submitted to the Purchaser, either via email or using the Q&A Tab in OregonBuys. SOS will publish all answers to questions in OregonBuys on the Q&A Tab. Questions and Answers are available to all prospective Proposers.

### 2.3.2 [Request for Change](#)

Proposers may submit a written request for change of anything contained in this RFP. This is the only opportunity to request changes to the provisions of the RFP.

### **2.3.3 Request for Change Submittal Process**

*All Requests for Change must:*

- i. be delivered to the [Purchaser](#) via email;
- ii. reference the RFP number;
- iii. identify prospective Proposer's name and contact information;
- iv. be signed by an authorized representative;
- v. state the proposed changes to the RFP provisions; **and**
- vi. be received by the due date and time identified in **Section 1.3 (Solicitation Schedule)**.

## **2.4 PROPOSAL SUBMITTAL PROCESS**

### **2.4.1 Proposal Preparation**

Proposers that are able to meet the requirements of **Section 3.1 – Minimum Requirements** may submit Proposal(s). See **Sections 3.2 (Proposal Submittals and Formatting) and 3.3 (Proposal Contents and Evaluation Criteria)** for detailed information regarding Proposal content requirements.

### **2.4.2 Proposal Delivery via OregonBuys**

Proposers are responsible for ensuring Proposals are submitted to SOS in OregonBuys before the Bid Opening Date. SOS is not responsible for any transmission errors or delays, or for any mis-delivery for any reason.

For guidance on how to submit your Proposal in OregonBuys, see **Attachment D – OregonBuys Vendor How-to Guides (Informational)**.

### **2.4.3 Proposal Modifications and Withdrawals via OregonBuys**

If a Proposer wishes to make modifications to a previously submitted Proposal, or to withdraw its Proposal, it must do so through OregonBuys prior to the Bid Opening Date.

*IMPORTANT NOTE: To create modifications, a Proposer must withdraw its Proposal first; make the necessary edits; and then resubmit. If a withdrawn Proposal is not resubmitted prior to the Bid Opening Date, then it will be considered unsubmitted and non-responsive.*

For more information on how to modify and/or withdraw Proposals, see **Attachment D – OregonBuys Vendor How-to Guides (Informational)**.

## **SECTION 3: PROPOSAL & EVALUATION (ROUND 1)**

### **3.1 MINIMUM REQUIREMENTS**

#### **3.1.1 Minimum Proposer Qualification Requirements**

- i. Proposer must have at least 2 clients currently using the proposed Solution.

### 3.1.2 Minimum Solution Requirements

- i. The Solution must have the capability to monitor online media.
- ii. The Solution must have the capability of providing notifications.
- iii. The Solution must not to exceed a total cost of \$146,000 for a 16-month period of performance.

## 3.2 PROPOSAL SUBMITTALS AND FORMATTING

Proposer shall complete its Proposal and submit all required documents electronically using OregonBuys.

Proposer shall submit its Proposal in multiple files and formats, as follows:

Document	Naming Convention*	File Format
<b>Administrative Proposal</b>	<i>ProposerName_AdminProposal</i>	.pdf**
<b>Redlined Sample Contract</b>	<i>ProposerName_AdminProposal_App1</i>	.docx
<b>The Service Proposal</b>	<i>ProposerName_ServiceProposal</i>	.pdf
<b>Cost Proposal</b>	<i>ProposerName_CostProposal</i>	.pdf
<b>Redacted copy for any of the above***</b>	<i>ProposerName_DocumentName_Redacted</i>	.pdf

*\*Naming conventions are requested, but not required.*

*\*\*All submitted portable document formats must be searchable.*

*\*\*\*All redacted documents are recommended to be submitted in a secure portable document format.*

## 3.3 PROPOSAL CONTENTS AND EVALUATION CRITERIA

### 3.3.1 Administrative Proposal

Proposer shall complete **Attachment C – Administrative Proposal Form (Returnable)**; obtain an authorized signature; and submit a copy with its Proposal.

### 3.3.2 Service Proposal

Proposer shall submit a Service Proposal per the outline and response prompts provided below.

#### 3.3.2.1 Proposal Section 1 – Proposer Overview & Understanding of MDM

Provide a brief overview of the history and organization of the Proposer. Explain Proposer's background and research into the issues of MDM in general and include how Proposer has helped combat MDM for its organization and its customers/clients (for both election integrity specifically and combatting MDM in general across any industry Proposer has serviced).

Provide examples and references of how Proposer's product/service has helped others

successfully combat MDM. Describe how Proposer has directly assisted its clients in high-stress situations (e.g., during an election season) regarding strategy and methods for “fighting back”.

### 3.3.2.1.1 Proposer Overview Evaluation Criteria

SOS will evaluate this section of the Proposal as follows:

<b>Criterion</b>	<b>Description</b>	<b>Points</b>
<b>Understanding of SOS Needs</b>	SOS desires doing business with a Proposer that has a thorough understanding of the MDM issues affecting elections officials in the United States, and particularly Oregon. How well does the Proposal demonstrate Proposer’s understanding of MDM issues and SOS’s needs?	5
<b>Experience</b>	SOS desires doing business with a Proposer that has experience providing solutions to combat MDM. How well does the Proposal demonstrate Proposer’s experience disarming MDM?	5
<b>History of client success</b>	SOS desires a Proposer solution that has a demonstrated record of success, and ideally in combatting MDM. How well does the Proposal demonstrate a record of success combatting MDM? Preference will be given for examples with elections.	5
<b>TOTAL POINTS (OUT OF 100) FOR THIS PROPOSAL SECTION:</b>		15

### 3.3.2.2 Proposal Section 2 – MDM Solution Overview

After reviewing **Attachment A – Solution Requirements (Informational)**, describe how Proposer’s solution meets SOS’s needs across the following Functional Requirement categories:

- a) Monitoring;
- b) Notification Management;
- c) Reporting; **and**
- d) Communication.

#### 3.3.2.2.1 MDM Solution Overview Evaluation Criteria

SOS will evaluate this section of the Proposal as follows:

<b>Criterion</b>	<b>Description</b>	<b>Points</b>
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<b>Monitoring Capabilities</b>	SOS desires a Solution that performs the entirety of the “Monitoring” Requirements Category. How well does the Proposal demonstrate a Solution that conforms to these Requirements?	15
<b>Notification Capabilities</b>	SOS desires a Solution that performs the entirety of the “Notifications Management” Requirements Category. How well does the Proposal demonstrate a Solution that conforms to these Requirements?	15
<b>Reporting Capabilities</b>	SOS desires a Solution that performs the entirety of the “Reporting” Requirements Category. How well does the Proposal demonstrate a Solution that conforms to these Requirements?	15
<b>Communication Capabilities</b>	SOS desires a Solution that performs the entirety of the “Communication” Requirements Category. How well does the Proposal demonstrate a Solution that conforms to these Requirements?	15
<b>TOTAL POINTS (OUT OF 100) FOR THIS PROPOSAL SECTION:</b>		<b>60</b>

### 3.3.2.3 Proposal Section 3 – Response to Non-Functional Requirements

Explain how Proposer’s solution can accommodate the following non-functional requirements:

- a) Scalability for multiple concurrent users, and Availability of the Solution to monitor and send notifications on a 24x7 basis.
- b) Ability of the solution to track how information is entered into the system, including who entered and/or changed the information.
- c) Ensuring that all access and data managed is valid and secure from tampering.
- d) Ability to export data into a .csv (or other compatible) file format.
- e) Solution is fully documented regarding any technology components that are part of the overall Proposer system.

#### 3.3.2.3.1 Response to Non-Functional Requirements Evaluation Criteria

SOS will evaluate this section of the Proposal as follows:

<b>Criterion</b>	<b>Description</b>	<b>Points</b>
<b>Availability &amp; Scalability</b>	SOS desires a solution that can accommodate multiple simultaneous users and that scales to accommodate increased traffic for monitoring. How well does the Proposal demonstrate compliance with these Requirements?	1
<b>Security</b>	SOS desires a solution that meets the Security Requirements of <b>Attachment A</b> and is demonstrably	2

	secure. How well does the Proposal illustrate compliance with this Requirement?	
<b>Auditability &amp; Integrity</b>	SOS desires a Solution that meets or exceeds its “Auditability” non-functional Requirement. How well does the Proposal illustrate compliance with this Requirement?	2
<b>TOTAL POINTS (OUT OF 100) FOR THIS PROPOSAL SECTION:</b>		5

### 3.3.2.4 Proposal Section 4 – Professional & Support Services

Describe Proposer’s team of researchers and subject matter experts that will be provided to assist the SOS Executive & Elections teams regarding trending topics, threats, and means for combatting MDM. Explain the anticipated level of effort that each assigned key person will provide the SOS during the course of the Contract.

Specify the training and deployment support that Proposer will provide to the SOS to ensure the solution is fully operational before the May 2024 election.

In addition to MDM SMEs, describe Proposer’s support team for any technology component of the solution and any associated service level agreement(s).

#### 3.3.2.4.1 Professional & Support Services Evaluation Criteria

SOS will evaluate this section of the Proposal as follows:

<b>Criterion</b>	<b>Description</b>	<b>Points</b>
<b>Quality of Professional Service Offerings</b>	SOS desires a Proposer team of experienced and highly qualified researchers and subject matter experts, and that the SOS will have some time to interface with directly. How well does the Proposal demonstrate qualified personnel that will be made available to the SOS?	10
<b>Service Levels</b>	SOS desires a Solution with a clear and comprehensive service level agreement with fast response & resolution times for high-priority tickets. How well does the Proposal demonstrate an SLA that meets the SOS’s needs?	10
<b>TOTAL POINTS (OUT OF 100) FOR THIS PROPOSAL SECTION:</b>		20

### 3.3.3 Cost Proposal

Proposers shall provide a Cost Proposal that includes the following:

- A rate card that specifies and aligns personnel and their hourly rates;
- Pricing for solution setup and the ongoing fees; and
- A commitment to not exceed the \$146,000 budget for the period of performance starting in October 2023 and ending January 2024.

#### 3.3.3.1 Price Evaluation Method

The Cost Proposal is evaluated on a pass/fail basis (see **Section 3.1**).

## 3.4 SOS EVALUATIONS

### 3.4.1 Pass/Fail Review

The Purchaser will conduct the initial pass/fail review of Proposals. The pass/fail review is focused on determining that the Proposal is Responsive to all RFP requirements, including but not limited to:

- i. determining compliance with the **Minimum Requirements (Section 3.1)**; and
- ii. ensuring **Proposal Delivery via OregonBuys (Section 2.4.2)**.

The SOS may contact any Proposer for clarification on a Proposal. SOS may waive minor informalities on any Proposal. To learn more about this process, see [OAR 137-047-0470](#).

### 3.4.2 Evaluation Committee

Responsive Proposals that pass the pass/fail review will be forwarded to the Evaluation Committee. The Evaluation Committee is typically made up of SOS representatives and subject matter experts but may include one or more members from outside of the SOS (e.g., County/City stakeholders and private consultants). The Evaluation Committee will independently evaluate and score each Proposal according to the Evaluation Criteria.

Note that for an RFP process with additional rounds of competition, Evaluators may change, including the overall size of the Evaluation Committee.

### 3.4.3 Process, Scoring, and Ranking

Evaluators will assign a score for each Proposal Section in the **Service Proposal (Section 3.3.2)**. Scores are based on the table below:

Score	Description
100	<b>Outstanding</b> – An excellent response with no apparent weaknesses.
90	<b>Great</b> – Many major strengths, one minor weakness.
80	<b>Very Good</b> – Some major strengths, one minor weakness.
70	<b>Good</b> – Some major strengths, some minor weaknesses.
60	<b>Ok</b> – Some moderate strengths, some minor weaknesses.



<b>50</b>	<b>Adequate</b> – Some strengths, one major weakness.
<b>40</b>	<b>Unsatisfactory</b> – Some minor strengths, one major weakness.
<b>30</b>	<b>Weak</b> – One minor strength, some major weaknesses.
<b>20</b>	<b>Poor</b> – One minor strength, many major weaknesses.
<b>10</b>	<b>Response of no value</b> – one minor strength, many major weaknesses.
<b>0</b>	<b>No Response.</b>

[Purchaser](#) may request further clarification to assist the Evaluation Committee in gaining additional understanding of a Proposal. A response to a clarification request must be to clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

### 3.4.3.1 Round 1 Score and Point Calculations

<b>RFP Section</b>	<b>Proposal Section</b>	<b>Points Available</b>
<b>3.3.2.1</b>	Proposal Section 1 – Proposer Overview & Understanding of MDM	15
<b>3.3.2.2</b>	Proposal Section 2 – MDM Solution Overview	60
<b>3.3.2.3</b>	Proposal Section 3 – Response to Non-Functional Requirements	5
<b>3.3.2.4</b>	Proposal Section 4 – Professional & Support Services	20
<b>3.3.3</b>	Cost Proposal	Pass/Fail
<b>TOTAL POSSIBLE POINTS:</b>		<b>100</b>

Scores are the values (0 through 100) assigned by each evaluator.

Points are the total possible for each section as listed in the table above.

The [Purchaser](#) will average all evaluator scores for each evaluation criterion under **Section 3.3.2**. The average score will be used as a percentage multiplier of the maximum possible points for that criterion: 10=10%, 50=50%, 72=72%, 90=90%, etc.

*EXAMPLE: A Proposer receives scores of 100, 90, and 95 for criterion worth 50 points. The Purchaser averages 100, 90, and 95 for a score of 95 and uses 95% as a multiplier to the possible points of 50. 50 multiplied by 95% is 47.5. Proposer A's points for the criterion is 47.5.*

The Cost Proposal points are calculated in the manner stated in **Section 3.3.3.1**.

## 3.5 NEXT STEP DETERMINATION

At the conclusion of this round of competition, SOS intends to proceed to Round 2 as specified in **Solution Demonstrations (Round 2)**. SOS anticipates the shortlist for Round 2 to include no more than the top 5 ranked Proposers. The shortlist may include less, based primarily on a natural break in the distribution of scores from Round 1. SOS will post a notice in OregonBuys of its Competitive Range Determination.

## SECTION 4: SOLUTION DEMONSTRATIONS (ROUND 2)

### 4.1 PROCESS OVERVIEW

Proposers will provide an oral presentation and demonstration of the proposed Solution. Shortlisted Proposers will adhere to the demonstration format specified below.

#### 4.1.1 Format and Responsibility

SOS will host virtual demos via a Microsoft Teams meeting. Demonstrations will be recorded by SOS and retained for evaluation and potentially contract negotiation purposes. Once the demonstration setup is complete and demos begin, no additional participants will be allowed to join from either the SOS or Proposer.

RECORDINGS AND TRANSCRIPTS FOR THE SOLUTION DEMONSTRATIONS ARE CONSIDERED PUBLIC RECORDS AND SUBJECT TO OREGON'S PUBLIC RECORDS LAWS. PROPOSER IS RESPONSIBLE FOR ENSURING THAT NO CONFIDENTIAL, PROPRIETARY, OR TRADE SECRETS ARE SHARED DURING DEMONSTRATIONS. SOS NEITHER GUARANTEES NOR WARRANTS THAT ANY RECORDINGS WILL BE REDACTED OR OTHERWISE WITHHELD FROM ANY POSSIBLE FUTURE PUBLIC RECORDS REQUESTS.

### 4.2 DEMO AGENDA

Proposer will adhere to the agenda below:

ACTIVITY	DURATION*
<b>Demonstration Setup**</b>	5 minutes
<b>Introductory Oral Presentations</b>	10 minutes
<b>Demonstrate Key Capabilities</b>	60 minutes
<b>Open Q&amp;A</b>	15 minutes
<b>MAXIMUM DURATION FOR DEMO</b>	<b>90 Minutes</b>

*\*Proposer is responsible for managing its time and the demo process. Both Proposer and Purchaser will track time for the activities noted above.*

*\*\*The demonstration setup is allotted to ensure both SOS and Proposer representatives are present and accounted for; to ensure audio checks and screensharing is functioning correctly, and etc.*

## 4.3 DEMONSTRATION PROCESS

### 4.3.1 Introductory Oral Presentation

Proposer shall begin the demonstrations with an oral presentation. The oral presentation is intended to allow Proposer to clarify their Proposal submitted in Round 1 and to “set the tone” for the product demonstration. The presentation should cover at least the following:

- Team Introductions (~5 minutes)
- About the Proposer (~5 minutes)

### 4.3.2 Solution Demonstration

The demonstration should be designed to provide SOS evaluators with a comprehensive understanding of the Solution’s capabilities and constraints. Proposers shall refer to **Attachment A – Solution Requirements (Informational)** and demonstrate how the Solution adheres to the desired functionality and capabilities described in the Functional Requirements section therein.

### 4.3.3 Questions and Answers

There is a specified duration set aside at the end to answer questions. SOS evaluators are permitted to request clarification on functionality at any time during the demos. Proposer is responsible for managing their time; therefore, Proposer may elect to answer the question during the scripted scenario (e.g., for quick and simple accommodations) or advise the Evaluator to ask the question again during the time allotted for questions and answers.

## 4.4 ROUND 2 EVALUATION PROCESS

### 4.4.1 Round 2 Scoring Methodology

SOS’s Evaluation Committee will score shortlisted Proposer demos. Evaluators will assign scores as follows:

Score	Description
100	<b>Outstanding</b> – An excellent demo with no apparent weaknesses.
90	<b>Great</b> – Many major strengths, one minor weakness.
80	<b>Very Good</b> – Some major strengths, one minor weakness.
70	<b>Good</b> – Some major strengths, some minor weaknesses.
60	<b>Ok</b> – Some moderate strengths, some minor weaknesses.
50	<b>Adequate</b> – Some strengths, one major weakness.

<b>40</b>	<b>Unsatisfactory</b> – Some minor strengths, one major weakness.
<b>30</b>	<b>Weak</b> – One minor strength, some major weaknesses.
<b>20</b>	<b>Poor</b> – One minor strength, many major weaknesses.
<b>10</b>	<b>Response of no value</b> – one minor strength, many major weaknesses.
<b>0</b>	<b>No Response.</b>

#### **4.4.2 Round 2 Evaluation Criteria**

##### **4.4.2.1 Round 2 Evaluation Item 1 – Presentation Clarity and Delivery**

- The SOS desires selecting a Proposer that can clearly articulate the Solution functionality to both technical and non-technical audiences during the demos. How well do the Oral Presentation & Demos illustrate this quality?

##### **4.4.2.2 Round 2 Evaluation Item 2 – Solution Functionality**

- The SOS desires a Solution that complies with all desired functionality described in **Attachment A – Solution Requirements (Informational)**. How well does the demo illustrate compliance with the requested features?
- The SOS desires a Solution that will provide value-add to the SOS’s larger efforts to combat MDM. How well does the demonstration illustrate additional value-add features not requested?
- The SOS desires a Solution that will provide smooth and seamless workflows. How well does the demonstration illustrate workflows and features that are error-free?

##### **4.4.2.3 Round 2 Evaluation Item 3 – Ease of Use**

- The SOS desires a Solution that is intuitive. How well does the demonstration illustrate an intuitive system?
- The SOS desires the ability to quickly identify and retrieve MDM. How well does the demonstration illustrate a system that is easy to navigate?
- The SOS desires notifications that are easy to interpret and can be used immediately to combat MDM. How well does the demonstration illustrate automation and features to support multi-tasking?
- The SOS desires a real time capability to combat MDM. How well does the demonstration illustrate real time capabilities?

##### **4.4.2.4 Round 2 Evaluation Item 4 – Flexibility & Fit for Oregon**

- The SOS desires a Solution that will be agile enough to adapt to new topics and forms of spreading MDM. How well does the demonstration illustrate features and configurations to support this need (e.g., monitoring new/additional sources of MDM, adding/updating/deleting topics of interest, and customizing/re-configuring standardized and/or ad hoc reporting parameters).

- The SOS desires a Solution that can support multiple SOS representatives that focus on combatting MDM. How well does the demonstration illustrate quick and easy. Modifications to user roles/privileges and/or reassignment of SOS access/seats/licenses (as applicable)?
- The SOS desires a Solution that is relevant to Oregon. How well does the demonstration illustrate a system that can focus on State of Oregon needs?

#### **4.4.3 Round 2 Point and Score Calculations**

ROUND 2 EVALUATION ITEM	POINTS AVAILABLE
Presentation Clarity & Delivery	10
Solution Functionality	60
Ease of Use	15
Flexibility & Fit for Oregon	15
<b>TOTAL POINTS:</b>	<b>100</b>

## **SECTION 5: AWARD AND NEGOTIATIONS**

### **5.1 METHOD OF AWARD**

SOS, if it awards a Contract, shall award a Contract to the highest-ranking Responsible Proposer based upon the cumulative scores received per the **Round 1 Score and Point Calculations (Section 3.4.3.1)** and **Round 2 Point and Score Calculations (Section 4.4.3)**.

### **5.2 TIEBREAKERS**

If Proposers are tied after completion of all evaluations, then SOS shall proceed with the tiebreaker process identified below.

*Note: SOS will determine if Proposals are tied based on the process outlined in [OAR 137-046-0300\(2\)](#).*

#### **5.2.1 SOS Option to Additional Rounds of Competition**

SOS may conduct additional rounds of competition and will determine the method and process in an RFP Addendum may consist of, but is not limited to:

- Interviews
- Presentations/Demonstrations
- Additional submittal items
- Discussions and submittal of revised Proposals

- Serial or simultaneous negotiations
- Best and Final Offers

### 5.2.1.1 Competitive Range Determination

If SOS determines that one or more additional rounds of competition is necessary, it will select a Competitive Range to indicate the Proposers that will be invited to participate in a subsequent round. The Competitive Range may include all, or at SOS's sole discretion, some of the Proposers from a previous round (based primarily on a natural break in the distribution of scores). SOS will post a notice in OregonBuys of its Competitive Range Determination and provide details about the process and schedule for the subsequent round.

### 5.2.2 Oregon Statutory Preferences

If SOS elects to conduct additional rounds of competition and they do not resolve the tiebreaker scenario, then SOS will resolve tied scores based on the following:

#### 5.2.2.1 Oregon Goods and Services

If SOS receives Proposals identical in price, fitness, availability, and quality and chooses to award a Contract, SOS shall award the Contract to the Proposer who is offering:

- Goods manufactured in the State; **and**
- Services, including Personal Services, performed in the State.

#### 5.2.2.2 Reciprocal Preference

For evaluation purposes per ORS 279A.120(2)(b), SOS shall add a percent increase to each out-of-state Proposer's Quote price that is equal to the percent preference, if any, given to a Resident Proposer in the [Proposer's state](#).

#### 5.2.2.3 Recycled Materials

SOS will select the Proposer offering Goods manufactured from Recycled Materials if each of the conditions specified in ORS 279A.125 (2) exists following any adjustments made to the price of the Goods according to any applicable reciprocal preference.

### 5.2.3 Drawing Lots

If an apparent awardee is not evident after evaluations and applying the Preference described above, then SOS will determine Award in accordance with [OAR 137-046-0300\(1\)\(b\)/\(c\)](#).

## 5.3 AWARD NOTIFICATION

SOS will notify all Proposers in Writing that SOS intends to award a Contract to the selected Proposer(s) subject to successful negotiation of any negotiable provisions. The notice will be issued as an attachment in OregonBuys via a Bid Amendment.

## 5.4 CONTRACT NEGOTIATION

SOS is willing to negotiate all items, except those listed below:

- Choice of law
- Choice of venue

- Constitutional requirements
- Requirements of applicable federal and State law

In the event that the parties have not reached mutually agreeable terms within 30 calendar days, SOS may terminate Negotiations and commence Negotiations with the next highest-ranking Proposer. Any subsequent negotiated changes are subject to prior approval of the Oregon Department of Justice.

## 5.5 AWARDEE SUBMITTALS

Any Proposer awarded a Contract is required to comply with the subsections below.

### 5.5.1 Insurance

Secure and demonstrate proof of insurance as required in this RFP or as negotiated. Insurance Requirements are found in **Exhibit B of Attachment B – Sample Contract (Returnable)**.

### 5.5.2 Proposer's W-9

Proposer shall provide its Taxpayer Identification Number and backup withholding status on a completed W-9 form when requested by SOS or when the backup withholding status or any other relevant information of Proposer has changed since the last submitted W-9 form, if any.

### 5.5.3 Oregon Business Registry

Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Contract. Visit <http://sos.oregon.gov/business/pages/register.aspx> for Oregon Business Registry information.

## SECTION 6: ADDITIONAL INFORMATION

### 6.1 AUTHORITY AND METHOD

SOS is issuing this RFP pursuant to its authority under ORS 279A.050(4), using the intermediate procurement method pursuant to ORS 279B.070 and OAR 137-047-0270.

### 6.2 CERTIFIED FIRM PARTICIPATION

Pursuant to Oregon Revised Statute (ORS) Chapter 200, SOS encourages the participation of small businesses, certified by the Oregon Certification Office for Business Inclusion and Diversity ("COBID") in all contracting opportunities. This includes certified small businesses in the following categories: disadvantaged business enterprise, minority-owned business, woman-owned business, a business that a service-disabled veteran owns or an emerging small business. SOS also encourages joint ventures or subcontracting with certified small business enterprises. For more information, visit:

<https://oregon4biz.diversitysoftware.com/FrontEnd/VendorSearchPublic.asp?XID=6787&TN=oregon4biz>

### **6.3 GOVERNING LAWS AND REGULATIONS**

This RFP is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFP, evaluation and award is the Circuit Court of Marion County for the State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or otherwise, to or from any Claim or consent to the jurisdiction of any court.

### **6.4 OWNERSHIP/PERMISSION TO USE MATERIALS**

All Proposals are public record and are subject to public inspection after SOS issues the Notice of the Intent to Award. Application of the Oregon Public Records Law will determine whether any information is actually exempt from disclosure.

All Proposals submitted in response to this RFP become the Property of SOS. By submitting a Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free license for the rights to copy, distribute, display, prepare derivative works of and transmit the Quote solely for the purpose of evaluating the Proposal, negotiating a Contract, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.311 through 192.478). Proposals, including supporting materials, will not be returned to Proposer.

### **6.5 CANCELLATION OF RFP; REJECTION OF PROPOSAL; NO DAMAGES**

Pursuant to ORS 279B.100, SOS may reject any or all Proposals in-whole or in-part or may cancel this RFP at any time when the rejection or cancellation is in the best interest of the State or SOS, as determined by SOS. Neither the State nor SOS is liable to any Proposer for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFP, award, or rejection of any Proposal.

### **6.6 COST OF SUBMITTING A PROPOSAL**

Proposer shall pay all the costs in submitting its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials, costs to participate in demonstrations, or costs associated with protests.

### **6.7 RECYCLABLE PRODUCTS**

Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the Services or Work set forth in this document and the subsequent Contract (see ORS 279B.025).



## **6.8 PRINTING, BINDING, AND STATIONARY WORK**

Except as provided in ORS 282.210(2), all printing, binding, and stationery work, including the manufacture of motor vehicle registration plates and plates required to be affixed to motor carriers, for the State or any county, city, town, port district, school district, or other political subdivision, must be performed within the State.

## **SECTION 7: RFP ATTACHMENTS**

- 7.1 ATTACHMENT A – SOLUTION REQUIREMENTS (INFORMATIONAL)**
- 7.2 ATTACHMENT B – SAMPLE CONTRACT (RETURNABLE)**
- 7.3 ATTACHMENT C – ADMINISTRATIVE PROPOSAL FORM (RETURNABLE)**
- 7.4 ATTACHMENT D – OREGONBUYS VENDOR HOW-TO GUIDES (INFORMATIONAL)**