

**STATEMENT OF WORK**

**INVITATION FOR BID**

**FOR**

# **Business Financial Reporting Services**

**ISSUING OFFICE**



**COMMONWEALTH OF PENNSYLVANIA**

**DEPARTMENT OF GENERAL SERVICES**

**BUREAU OF PROCUREMENT**

**1800 Herr St.**

**Arsenal Bldg. 2<sup>nd</sup> Floor**

**Harrisburg, PA 17103-1540**

**IFB NUMBER**

**6100064594**

**DATE OF ISSUANCE**

**11/05/2025**

**PART IV**  
**STATEMENT OF WORK**  
**TABLE OF CONTENTS**

- Part IV-1      GENERAL INFORMATION**
- Part IV-2      BID REQUIREMENTS**
- Part IV-3      AGENCY ORDERING PROCESS**
- Part IV-4      SCOPE OF SERVICES**
- Part IV-5      PAYMENT PROVISIONS**
- Part IV-6      INQUIRIES**

**Appendix A – STANDARD CONTRACT TERMS AND CONDITIONS**

**Appendix B – DOMESTIC WORKFORCE UTILIZATION FORM**

**Appendix C – IRAN FREE PROCUREMENT**

**Appendix D - LOBBYING CERTIFICATION FORM**

**Appendix E – WORK PROTECTION & CERTIFICATION FORM**

**Appendix F – COSTARS FORM**

**PART IV**  
**STATEMENT OF WORK**

**IV-1. GENERAL INFORMATION**

**Overview:** This Invitation for Bids (“IFB”) will cover the requirements to provide Commonwealth agencies with market research and business intelligence information. The Pennsylvania Department of General Services (“DGS”) is seeking qualified Suppliers with the technology and experience in providing commercial information and insight on businesses, which allows customers to make information-based business decisions. The Awarded Suppliers must be able to provide On-Line, Report, and Subscription services, which may include, but are not limited to, Business Reports, Company Reports, Country Reports, Commodity Reports, Industry Standards, Economic Reports, Price Indexes etc. The market research and business intelligence should provide descriptions of markets, business trends, current conditions and forecasts and should provide quantitative and qualitative research on topics required. Reporting should include details on industries, technologies, and companies, as well as population demographics and country profiles.

- A. METHOD OF AWARD (“MULTIPLE AWARD”):** Award will be made on a multiple award basis to all responsible and responsive bidders who comply with the Eligibility Requirements set forth in this IFB. When services are needed, using agencies will issue a Request for Quotes (“RFQ”) to suppliers on the List of Awarded Suppliers and will issue a Purchase Order to the Selected Suppliers based on best value. Specific agency/facility requirements will be provided on each individual agency’s RFQ. There is no guarantee that the award of a Contract will result in the award of a purchase order.
- B. BEST VALUE DETERMINATION:** Best value refers to the process of selecting the quote (or quotes) which provides the greatest value to the using agency based on the evaluation and comparison of all pertinent criteria, including cost, so that the suppliers whose overall quote best suits the using agency’s needs is selected.
- C. CONTRACT TERM:** Effective date is listed on the executed contracts and is for three years. Contracts may be renewed two additional one-year terms per the Contract Terms and Conditions.
- D. ISSUING OFFICE:** DGS BOP has issued this IFB on behalf of the Commonwealth. The sole point of contact in the Commonwealth for this IFB shall be Jason Hildebrandt Issuing Officer. Please refer all inquiries to the Issuing Officer via e-mail at [jahildebra@pa.gov](mailto:jahildebra@pa.gov)

**QUESTIONS AND ANSWERS:** If a bidder has any questions regarding this IFB, the bidder must submit the questions via e-mail (***with the subject line “IFB 6100064594 Question”***) to the Issuing Officer named above. Questions must be submitted via e-

mail no later than Thursday, November 12, 2025. The Issuing Officer shall post as an addendum to this IFB the answers to the questions on the DGS website. Each bidder shall be responsible for monitoring the DGS website [www.emarketplace.state.pa.us](http://www.emarketplace.state.pa.us) for new or revised IFB information.

**IV-2. BID REQUIREMENTS** Suppliers interested in submitting a bid to become an Awarded Supplier must meet all the bid requirements. Bidders whose bids fail to meet the following requirements may result in bid rejection:

**A. SUPPLIER REGISTRATION:** Interested bidders must register as a supplier on the PA Supplier Portal at [www.pasupplierportal.state.pa.us](http://www.pasupplierportal.state.pa.us). If your company is already registered in the PA Supplier Portal, registration is not necessary. Prior to registration, bidders are strongly encouraged to review the Supplier Registration and Bidding guides available at the Supplier Service Center at:

<https://www.dgs.pa.gov/Materials-Services-Procurement/Supplier-Service-Center>

For any questions or issues related to the registration process, contact the Supplier Service Center (“SSC”) at 877-435-7363 Option 1. For any questions or issues related to the online bidding process, contact the SSC at 877-435-7363 **Option 2.**

**B. BID SUBMISSION:** Bids must be electronically received through the PA Supplier Portal, [www.pasupplierportal.state.pa.us](http://www.pasupplierportal.state.pa.us). To be considered for Contract award, bidder must complete and return the following documents in response to this IFB:

**1. Price List:** Bidders must supply their current price list or catalog in electronic format via either Microsoft Word Document, Excel Spreadsheet, or PDF. Suppliers may not publish any price list for use by Commonwealth agencies with alternate pricing or additional terms and conditions. Any other Supplier terms and conditions that may appear on the Supplier’s price list, including but not limited to, prices subject to change without notice will not be part of this Contract and will have no force or effect on this Contract or Purchase Orders issued by Commonwealth agencies.

**2. Appendix B –Domestic Workforce Utilization Certification Form:** To the extent that any services could be performed outside of the geographical boundaries of the United States, the Bidder will be required to certify that those services will be performed exclusively within the geographical boundaries of the United States or specify the percentage of the direct labor that will be performed outside of the United States. The certification form is included with the IFB and must be completed by the Bidder. The Contracting Agency will use the certification in making a best value selection.

**3. Appendix C – Iran Free Procurement Form:** Attach completed, signed form with bid. Prior to entering a contract worth at least \$1,000,000 or more with a Commonwealth entity, a bidder must: a) certify it is not on the current list of

persons engaged in investment activities in Iran created by the Pennsylvania Department of General Services (“DGS”) pursuant to Section 3503 of the Procurement Code and is eligible to contract with the Commonwealth under Sections 3501-3506 of the Procurement Code; or b) demonstrate it has received an exception from the certification requirement for that solicitation or contract pursuant to Section 3503(e). All bidders must complete and return the Iran Free Procurement Certification form, which is attached hereto and made part of this IFB. The completed and signed Iran Free Procurement Certification form must be submitted with the Bid Response. See the following web page for current Iran Free Procurement list:

<https://www.dgs.pa.gov/Documents/Procurement%20Forms/ProposedIranFreeProcurementList.pdf>

**4. Appendix D: Lobbying Certification Form**

**5. Appendix E: Work Protection and Investment Certification Form**

**6. Appendix F: COSTARS Form**

**7. Subscriber Agreement:** To incorporate as a reference in the contract per Section IV-3(B)(1), please submit a copy with your bid.

**8. Account Manager:** A phone number, cell phone number, fax number, email address, and alternate contact shall be provided for the account manager with the bid submission. The account manager that will serve as the key point of contact for Commonwealth agencies and DGS BOP. Account managers must be available between the hours of 7:30 am to 5:00 pm. Any changes in the account manager shall be kept to a minimum, and DGS BOP shall be notified immediately.

**9. Additional Services:** Additional services, reasonably construed to be within the scope of this procurement, may be **added** during the term of the contract only with the written permission of the DGS contract administrator.

**Failure to return required bid documents may result in rejection of the bid.**

**IV-3. SCOPE OF SERVICES**

**A. SERVICES:** The Awarded Supplier(s) shall provide comprehensive Business Financial services as defined in IV-4 of the IFB. These services will be provided as an independent contractor, not as an employee(s) of the Commonwealth. The Awarded Supplier(s) shall render services in accordance with the policies, procedures, and standards of each Commonwealth agency.

**B. Addition of New Suppliers:** New Contractors may be added at the discretion of the Department of General Services (“DGS”).

**C. Agencies:** For the purpose of this IFB, the following are agencies that have used business financial services in the past year, this is provided for information purposes only. Throughout the contract, additional agencies may request business financial reporting.

1. Department of Revenue (“DOR”)
2. Department of Community and Economic Development (“DCED”)
3. Department of General Services (“DGS”)
4. Department of Health (“DOH”)
5. Department of Labor & Industry (“L&I”)

**D. Subscriber Agreement:** Except to the extent, it is *inconsistent* with the Standard Contract Terms and Conditions and this Statement of Work, the Supplier’s Subscriber Agreement, shall bind all purchasing agencies. The terms and conditions of this Contract shall be the exclusive terms of agreement between the Contractor and the Commonwealth and take precedence over any Subscriber Agreement. All quotations requested and received from the Contractor are for obtaining firm pricing only. Other terms and conditions or additional terms and conditions included or referenced in the Contractor’s quotations, invoices, business forms, or other documentation shall not become part of the parties’ agreement and shall be disregarded by the parties, unenforceable by the Contractor and not binding on the Commonwealth.

**E. Account Services:** The Supplier shall provide individual account services to each participating agency, to include issuing user passwords, providing user training and support, and providing separate accounting and invoicing for each participating agency. Any participating agency may directly notify the Supplier’s assigned service representative of any additions, substitutions, and deletions (“changes”) to the identities and numbers of business service users on a monthly basis; provided, however, that the Supplier shall adjust the participating agency’s monthly payment to accommodate the changes.

**F. AGENCY SPEND.** For informational purposes, spend for business financial services May 1, 2024, through May 1, 2025, was estimated to be approximately \$1,300,000.00 among the awarded suppliers. No additional spend information is available.

Previous current contracts are published at [www.emarketplace.state.pa.us](http://www.emarketplace.state.pa.us).

**IV-5. PAYMENT PROVISIONS.** The Awarded Supplier(s) will be reimbursed for business financial services provided to each using Agency.

Invoices can be emailed to [69180@pa.gov](mailto:69180@pa.gov).

For details and requirements of the commonwealth's E-Invoicing Program, please visit Office of the Budget's [E-Invoicing Program](#) page for details and requirements.

For services procured that are less than \$10,000 (or current established threshold) in a fiscal year and handled with P-Card, services must be handled in accordance with Management Directive 310.23 Commonwealth Purchasing Card Program Link:  
[https://www.oa.pa.gov/Policies/md/Documents/310\\_23.pdf](https://www.oa.pa.gov/Policies/md/Documents/310_23.pdf)

**IV-6. INQUIRIES:** Direct all questions concerning this Contract to Commodity Specialist Jason Hildebrandt, Telephone No. 717-346-8188, e-mail: [jahildebra@pa.gov](mailto:jahildebra@pa.gov)