

REQUEST FOR PROPOSALS

FOR

**Election Management and Administrative Services for the Election of
Public School Employees' Retirement Board Trustees**

ISSUING OFFICE

**Commonwealth of Pennsylvania
Public School Employees' Retirement System (PSERS)**

**RFP NUMBER
PSERS RFP #2025-8**

**DATE OF RE-ISSUANCE
November 17, 2025**

The reissuance of this Request for Proposal reflects changes identified from RFP2024-4 and RFP2024-5 in addition to changes to the PSERS [Board's Elections Policy](#). Offerors who submitted Proposals in response to prior issuances are strongly encouraged to review this issuance carefully for changes.

Small Diverse Business (SDB) and Veteran Business Enterprise (VBE) Participation. The Issuing Office and the Department of General Services' Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO) has **not** set Small Diverse Business (SDB) and/or Veteran Business Enterprise (VBE) participation goals for this procurement. In addition, there will be no points allocated toward SDB/VBE participation for this procurement.

**REQUEST FOR PROPOSALS FOR
PSERS RFP# 2025-8
Election Management and Administrative Services for the Election of
Public School Employees' Retirement Board Trustees**

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CALENDAR OF EVENTS

The Commonwealth will make every effort to adhere to the following schedule:

Activity	Responsibility	Date
Deadline to submit questions via email to the Issuing Office at RA-PSPROCUREMENT@pa.gov	Potential Offerors	Monday, December 1, 2025 12:00 PM
Answers to Potential Offeror questions will be posted on eMarketplace no later than this date. http://www.emarketplace.state.pa.us/Search.aspx	Issuing Office	Friday, December 5, 2025 4:00 PM
Monitor eMarketplace website for all communications regarding the RFP.	Potential Offerors	Ongoing
Sealed proposal must be received by the Issuing Office at: Public School Employees' Retirement System ATTN: BOA/Procurement RFP2025-8 5 North 5 th Street, Rm 117-1 Harrisburg, PA 17101	Offerors	Wednesday, December 17, 2025 1:00PM
Finalist presentations if necessary. Offerors should be available to present in person if requested.	Selected Offerors	TBD

PART I

GENERAL INFORMATION

- I-1. **Purpose.** This request for proposals (“RFP”) provides to those interested in submitting proposals for the subject procurement (“Offerors”) sufficient information to enable them to prepare and submit proposals for the **Public School Employees’ Retirement System’s (“PSERS”)** consideration on behalf of the Commonwealth of Pennsylvania (“Commonwealth”) to satisfy a need for Election Management and Administrative Services for the Election of Public School Employees’ Retirement Board Trustees (“Project”). This RFP contains instructions governing the requested proposals, including the requirements for the information and material to be included; a description of the service to be provided; requirements which Offerors must meet to be eligible for consideration; general evaluation criteria; and other requirements specific to this RFP.
- I-2. **Issuing Office.** PSERS, Bureau of Administration, Purchasing and Contracting Division (“Issuing Office”) has issued this RFP on behalf of the Commonwealth. Its staff shall act as Issuing Officers. The sole point of contact in the Commonwealth for this RFP shall be the Issuing Office and can be contacted at:
- PSERS
ATTN: BOA/ PCD RFP#2025-8
5 North 5th Street
Harrisburg, PA 17101
Email: RA-psprocurement@pa.gov
- I-3. **Overview of Organization and Project.** PSERS is required to conduct confidential ballot elections from among its approximately 157,000 active certified and 112,000 non-certified members, 257,000 annuitants and participants receiving distributions (“Retirees”), and 4,500 school board members to elect six of the fifteen members of the Public School Employees’ Retirement Board who are elected by the constituencies. These elections will take place at specified times from June 1, 2026, through and including December 31, 2030. These elections shall include all regularly scheduled elections, plus any special elections that are not currently scheduled that might be necessitated during the period. Any contract resulting from the issuance of this RFP is anticipated to commence on or before June 1, 2026. In accordance with PSERS Board Elections Policy (2025-POL-BD-08), the PSERS Executive Director may decide the manner in which the election of the elective members of the Board shall be conducted, to include PSERS conducting any or all elections at its discretion.

Objectives.

- A. **General.** PSERS is seeking a competent, independent contractor who will accept the sole responsibility for the preparation and distribution of election ballots to the constituencies and, to receive, validate, and tabulate votes, and certify the election

results. To lower costs and to encourage greater participation, the Offeror must have the capability to utilize electronic methods of voting using both the internet and an interactive voice response (IVR) telephone system, in addition to the capability to conduct an election entirely via paper ballots, if necessary. The Offeror's proposal should address the following:

1. Maximize the number of ballots received by qualified electors;
 2. Provide a ballot secure from tampering/fraud;
 3. Maintain strict ballot secrecy;
 4. Maximize the response rates through a clear, engaging ballot design and a high-quality validation system;
 5. Maximize postal discounts through cost effective use of outgoing and incoming mail options;
 6. Provide comprehensive standard and special reports, including a certification of the results of all scheduled and special elections within 30 days of the completion of an election;
 7. Maintain all electronic and paper documents, files, and records (hereinafter collectively referred to as "Records") in support of all elections and certifications thereof for six months or 30 days following notification to non-elected candidates, whichever is longer; (See **PART III, Section III-8**)
 8. Minimize cost per ballot mailed/responses tabulated;
 9. Provide timely, responsive support to PSERS from ballot design through final disposition of Records; and
 10. Demonstrate experience in conducting, validating, tabulating, and certifying results of an election.
- B. Specific.** Develop a confidential ballot system to conduct elections for the Public School Employees' Retirement Board in accordance with the [*PSERS Board Elections Policy*](#) as the schedule for which is summarized in **APPENDIX G** for the following elections, to include any special election needed for an active certified, non-certified, Retiree, or school board member when a vacancy on PSERS Board has occurred:

2026 Election	Total Estimated Electorate
Active Certified - Members	157,000
School Board Members	4,500
2027 Election	
Active Certified - Members	157,000
Active -Non-Certified Members	112,000
2028 Election	
Active Certified - Members	157,000
Retirees	257,000
2029 Election	
Active Certified - Members	157,000
School Board Members	4,500
2030 Election	
Active Certified - Members	157,000
Active-Non-Certified Members	112,000
Special Election(s)	
Only as required	TBD, as applicable

- I-4. Type of Contract.** If the Issuing Office enters into a contract as a result of this RFP, it will be a **Fixed Fee** contract containing the Commonwealth Standard Terms and Conditions as shown in **PART V**. A “fixed fee” or a “firm, fixed price” contract is one where the unit pricing is set but the total price varies because actual quantities purchased deviate from the quantities estimated to be purchased. The Issuing Office, in its sole discretion, may undertake negotiations with Offerors whose proposals, in the judgment of the Issuing Office, show them to be qualified, responsible, and capable of performing the Project.
- I-5. Rejection of Proposals.** The Issuing Office reserves the right, in its sole and complete discretion, to reject any proposal received as a result of this RFP.
- I-6. Incurring Costs.** The Issuing Office is not liable for any costs the Offeror incurs in preparation and submission of its proposal, in participating in the RFP process or in anticipation of award of the contract.
- I-7. Intentionally omitted.**

I-8. Questions and Answers. If an Offeror has any questions regarding this RFP, the Offeror must submit the questions by email (**with the subject line “PSERS RFP #2025-8 Question”**) to the Issuing Office at the address identified in **PART I, Section I-2** of the RFP. If the Offeror has questions, they may be submitted as they arise via email, but **no later than** the date indicated on the Calendar of Events. The Issuing Office shall post the answers to the questions to eMarketplace at <https://www.emarketplace.state.pa.us/Search.aspx> on an ongoing basis until the deadline stated on the Calendar of Events. When an Offeror submits a question after the deadline date for receipt of questions indicated on the Calendar of Events, the Issuing Office *may* respond to questions of an administrative nature by directing the questioning Offeror to specific provisions in the RFP. To the extent that the Issuing Office decides to respond to a non-administrative question *after* the deadline date, the question and answer will be provided to all Offerors through an addendum.

All questions and responses as posted to eMarketplace are considered as an addendum to, and part of, this RFP in accordance with **PART I, Section I-9**. Each Offeror shall be responsible to monitor eMarketplace for new or revised RFP information. The Issuing Office shall not be bound by any verbal information, nor shall it be bound by any written information that is not either contained within the RFP or formally issued as an addendum by the Issuing Office. The Issuing Office does not consider questions to be a protest of the specifications or of the solicitation. The required protest process for Commonwealth procurements is described in **PART I, Section I-26**.

I-9. Addenda to the RFP. If the Issuing Office deems it necessary to revise any part of this RFP before the proposal response date, the Issuing Office will post an addendum to eMarketplace at <https://www.emarketplace.state.pa.us/Search.aspx>. It is the Offeror’s responsibility to periodically check eMarketplace for any new information or addenda to the RFP. Answers to the questions asked during the Questions & Answers period also will be posted to eMarketplace as addenda to the RFP.

I-10. Response Date. To be considered for selection, electronic proposal submissions as described in **PART I, Section I-11** must arrive at the Issuing Office on or before the time and date specified in the RFP Calendar of Events. The Issuing Office will **not** accept proposals via email or facsimile transmission. Offerors who send proposals by mail or other delivery service should allow sufficient delivery time to ensure timely receipt of their proposals. If, due to inclement weather, natural disaster, or any other cause, the Commonwealth office location to which proposals are to be returned is closed on the proposal response date, the deadline for submission will be automatically extended until the next Commonwealth business day on which the office is open, unless the Issuing Office otherwise notifies Offerors. The hour for submission of proposals shall remain the same. The Issuing Office will reject (unopened) any late proposals.

I-11. Proposal Requirements. To be considered, Offerors shall submit a complete response to this RFP to the Issuing Office, using the methods and format provided below.

A. Proposal Submission: Offerors are required to submit **both** paper and electronic copies of their proposals. Electronic copies may not be submitted in lieu of paper proposals. The Issuing Office will reject proposals which fail to meet this requirement.

1. Paper Submittals. Offerors will provide:

- a.** Three (3) paper copies [one marked “ORIGINAL”] of the Technical Submittal. Offerors should ensure that there is no costing information in the Technical Submittal. The Issuing Office will reject proposals which include costing information as non-responsive.
- b.** One (1) separately sealed (envelope preferred) paper copy of the Cost Submittal. Offerors should not reiterate technical information in the Cost Submittal.

2. Electronic Submittals.

- a.** Offerors shall submit one (1) complete and exact electronic copy of the entire proposal with named separate files, including the:
 - i)** Technical Submittal; and
 - ii)** Cost Submittal.
- b.** Offerors shall submit one (1) complete and exact redacted electronic copy of the entire proposal if the Offeror determines that it must divulge confidential, propriety or trade secret information as outlined in **PART I, Section I-17**.
- c.** The electronic submittals must be submitted on a USB/Flash drive using Microsoft Word, Microsoft Excel or Adobe PDF formats. Offerors may not lock or password protect, in whole or in part, any electronic files that are part of their Submittal without providing the password or key to unlock the files. The USB/Flash drive should clearly identify the Offeror and include the name and version number of the virus scanning software that was used to scan the USB/Flash drive before it was submitted.

3. The Offeror shall make no other distribution of its proposal to any other Offeror or Commonwealth official or Commonwealth consultant. Each proposal page should be numbered for ease of reference.

4. An official authorized to bind the Offeror to its provisions must sign the proposal using **APPENDIX A Proposal Cover Sheet**.

5. For this RFP, the proposal must remain valid for 120 days or until a contract is fully executed. If the Issuing Office selects the Offeror's proposal for award, the contents of the selected Offeror's proposal will become, except to the extent the contents are changed through Best and Final Offers or negotiations, contractual obligations.
 6. Each Offeror submitting a proposal specifically waives any right to withdraw or modify it, except that the Offeror or its authorized representative may:
 - a. Withdraw or modify its proposal by written notice received at the Issuing Office's address for proposal delivery prior to the exact hour and date specified for proposal receipt. Modifications must be marked as "Revised Proposal", include both paper and electronic submittals for the proposal and comply with RFP requirements.
 - b. Withdraw or modify its proposal in person prior to the exact hour and date set for proposal receipt, provided the withdrawing person provides appropriate identification. Modifications must be marked as "Revised Proposal", include both paper and electronic submittals for the proposal and comply with RFP requirements.
- B. Proposal Format:** Offerors must submit their proposals in the format, including heading descriptions, outlined below. To be considered, the proposal must respond to all proposal requirements. Offerors should provide any other information thought to be relevant, but not applicable to the enumerated categories, as an appendix to the Proposal. **All cost data relating to this proposal should be kept separate from and not included in the Technical Submittal. Offerors should not reiterate technical information in the cost submittal.**

Each proposal shall consist of the following **two (2) separate** submittals:

1. Technical Submittal, in response to **PART III**; and
 - a. Complete, sign and include **APPENDIX A – Proposal Cover Sheet**; and
 - b. Complete, sign and include **APPENDIX B – Domestic Workforce Utilization Certification**; and
 - c. Complete, sign and include **APPENDIX C – Iran Free Procurement Certification Form**; and
 - d. Complete, sign and include **APPENDIX D – Trade Secret/ Confidential Proprietary Information Notice**; and

e. Complete, sign and include **APPENDIX E – Worker Protection and Investment Certification Form**; and

f. **Complete, sign and include APPENDIX I – Non-Investment Contracts and Political Contributions Report.**

2. Cost Submittal, in response to RFP **PART IV** and as found at **APPENDIX F, Cost Submittal Worksheet.**

C. The Issuing Office reserves the right to request additional information which, in the Issuing Office's opinion, is necessary to assure that the Offeror's competence, number of qualified employees, business organization, and financial resources are adequate to perform according to the RFP.

D. The Issuing Office may make inquiries as deemed necessary to determine the ability of the Offeror to perform the Project, and the Offeror shall furnish to the Issuing Office all requested information and data. The Issuing Office reserves the right to reject any proposal if the evidence submitted by, or investigation of, such Offeror fails to satisfy the Issuing Office that such Offeror is properly qualified to carry out the obligations of the RFP and to complete the Project as specified.

I-12. Economy of Preparation. Offerors should prepare proposals simply and economically, providing a straightforward, concise description of the Offeror's ability to meet the requirements of the RFP. **Please note additional information on this requirement in PART III.**

I-13. Alternate Proposals. The Issuing Office has identified the basic approach to meeting its requirements, allowing Offerors to be creative and propose their best solution to meeting these requirements. The Issuing Office will not accept alternate proposals.

I-14. Discussions for Clarification. Offerors may be required to make an oral or written clarification of their proposals to the Issuing Office to ensure thorough, mutual understanding and responsiveness to the solicitation requirements. The Issuing Office will initiate requests for clarification. Clarifications may occur at any stage of the evaluation and selection process prior to contract execution.

I-15. Prime Contractor Responsibilities. The selected Offeror must perform at minimum, 51% of the work under this contract. Nevertheless, the contract will require the selected Offeror to assume responsibility for all services offered in its proposal whether it produces them itself or by subcontract. The Issuing Office will consider the selected Offeror to be the sole point of contact with regard to all contractual matters.

I-16. Oral Presentations. Proposers achieving the 75% Technical assessment threshold may be required to provide an oral presentation of the services proposed. This presentation will

serve as a proof of the conceptual requirements described in **PART III** of the Technical proposal and will be evaluated to confirm Proposer's narrative explanations of the services proposed.

I-17. Proposal Contents.

- A. Confidential Information.** The Commonwealth is not requesting, and does not require, confidential proprietary information or trade secrets to be included as part of Offerors' submissions in order to evaluate proposals submitted in response to this RFP. Accordingly, except as provided herein, Offerors should not label proposal submissions as confidential or proprietary or trade secret protected. Any Offeror who determines that it must divulge such information as part of its proposal must submit the signed written statement described in subsection C. below and must additionally provide a redacted version of its proposal on USB/Flash drive, which removes only the confidential proprietary information and trade secrets, for required public disclosure purposes. The USB/Flash drive, should clearly identify the Offeror, note that it is a redacted copy and include the name and version number of the virus scanning software that was used to scan the USB/Flash drive, before it was submitted. **If a written statement and redacted version of the proposal is not submitted at the time of the proposal submission, the proposal will be subject to release as submitted with only the financial capability redacted.**
- B. Commonwealth Use.** All material submitted with the proposal shall be considered the property of the Commonwealth of Pennsylvania. The Commonwealth has the right to use any or all ideas not protected by intellectual property rights that are presented in any proposal regardless of whether the proposal becomes part of a contract. Notwithstanding any Offeror copyright designations contained in proposals, the Commonwealth shall have the right to make copies and distribute proposals internally and to comply with public record or other disclosure requirements under the provisions of any Commonwealth or United States statute or regulation, or rule or order of any court of competent jurisdiction.
- C. Public Disclosure.** After the award of a contract pursuant to this RFP, all proposal submissions are subject to disclosure in response to a request for public records made under the Pennsylvania Right-to-Know-Law, 65 P.S. § 67.101, et seq. If a proposal submission contains confidential proprietary information or trade secrets, a signed written statement to this effect must be provided with the submission in accordance with 65 P.S. § 67.707(b) for the information to be considered exempt under 65 P.S. § 67.708(b)(11) from public records requests. Refer to **APPENDIX D** of the RFP for a **Trade Secret/ Confidential Proprietary Information Notice Form** that may be utilized as the signed written statement, if applicable. If financial capability information is submitted in response to **PART III** of this RFP, such financial capability information is exempt from public records disclosure under 65 P.S. § 67.708(b)(26).

I-18. Best and Final Offers (BAFO).

- A.** While not required, the Issuing Office reserves the right to conduct discussions with Offerors for the purpose of obtaining “best and final offers.” To obtain BAFOs from Offerors, the Issuing Office may do one or more of the following, in any combination and order:
1. Schedule oral presentations;
 2. Request revised proposals; and
 3. Enter into pre-selection negotiations.
- B.** The following Offerors will **not** be invited by the Issuing Office to submit a BAFO:
1. Those Offerors which the Issuing Office has determined to be not responsible or whose proposals the Issuing Office has determined to be not responsive.
 2. Those Offerors which the Issuing Office has determined in accordance with **PART II, Section II-5** from the submitted and gathered financial and other information, do not possess the financial capability, experience or qualifications to assure good faith performance of the contract.
 3. Those Offerors whose score for their technical submittal of the proposal is less than 75% of the total amount of technical points allotted to the technical criterion.
- The Issuing Office may further limit participation in the BAFO process to those remaining responsible Offerors which the Issuing Office has, within its discretion, determined to be within the top competitive range of responsive proposals.
- C.** The Evaluation Criteria found in **PART II, Section II-4**, shall also be used to evaluate the BAFOs.
- D.** Price reductions offered through any BAFO shall have no effect upon the Offeror’s Technical Submittal.

I-19. News Releases. Offerors shall not issue news releases, Internet postings, advertisements or any other public communications pertaining to this Project without prior written approval of the Issuing Office, and then only in coordination with the Issuing Office.

I-20. Restriction of Contact. From the issue date of this RFP until the Issuing Office selects a proposal for award, the Issuing Officer is the sole point of contact concerning this RFP. Any violation of this condition may be cause for the Issuing Office to reject the offending Offeror’s proposal. If the Issuing Office later discovers that the Offeror has engaged in any

violations of this condition, the Issuing Office may reject the offending Offeror's proposal or rescind its contract award. Offerors must agree not to distribute any part of their proposals beyond the Issuing Office. An Offeror who shares information contained in its proposal with other Commonwealth personnel and/or competing Offeror personnel may be disqualified.

I-21. Issuing Office Participation. Offerors shall provide all services, supplies, facilities, and other support necessary to complete the identified work, except as otherwise provided in this **PART I, Section I-21**.

- A.** PSERS will designate a Project Manager as the contact on all election matters. This person may arrange progress meetings as needed. The Offeror and members of PSERS staff may attend these meetings.
- B.** PSERS will notify Offeror if an election has only one candidate who qualifies to appear on the ballot and no election will be conducted.
- C.** PSERS will provide the name and a brief biographical sketch of each candidate. This will be done in accordance with **APPENDIX G Draft Time Schedule for Conducting Board Elections**.
- D.** PSERS will promptly review and approve all draft material submitted by the Offeror or return it to the Offeror for redrafting with the reasons for its rejection. This will be done in accordance with **APPENDIX G Draft Time Schedule for Conducting Board Elections**.
- E.** PSERS will provide separate computer files for active certified and active non-certified members containing the name, mailing address, and numeric member identifier for each active certified or active non-certified member's election.
- F.** PSERS will provide computer files for Retirees containing the names, mailing addresses, and numeric member identifier for each Retiree election.
- G.** PSERS will provide material for school board members containing name and mailing address for each school board election.
- H.** Postage shall be paid by PSERS through separate accounts established with the United States Postal Service (USPS) or, if deemed necessary by the Project Manager, directly to the Offeror to reimburse paid postage costs. Offeror will provide the Project Manager with an estimated cost of each election.
- I.** PSERS will provide documentation to the contractor in advance of mailing to meet address move update requirements of the USPS.

- J. PSERS shall perform testing of the Interactive Voice Response System (“IVR”) and website using the pin number provided by the Offeror and the PSERS-provided unique numeric identifier.

I-22. Term of Contract. The initial term of the contract will commence on the Effective Date and will end on April 30, 2029. On or before the conclusion of the initial term, PSERS shall have the right, in its sole discretion, to renew the contract on a year-to-year basis or a multiple year basis not to exceed two (2) one-year renewal terms. The Issuing Office will fix the Effective Date after the contract has been fully executed by the selected Offeror and by the Commonwealth and all approvals required by Commonwealth contracting procedures have been obtained. The selected Offeror shall not start the performance of any work prior to the Effective Date of the contract and the Commonwealth shall not be liable to pay the selected Offeror for any service or work performed or expenses incurred before the Effective Date of the contract.

I-23. Offeror’s Representations and Authorizations. By submitting its proposal, each Offeror understands, represents, and acknowledges that:

- A. All of the Offeror’s information and representations in the proposal are material and important, and the Issuing Office may rely upon the contents of the proposal in awarding the contract(s). The Commonwealth shall treat any misstatement, omission or misrepresentation as fraudulent concealment of the true facts relating to the Proposal submission, punishable pursuant to 18 Pa. C.S. § 4904.
- B. The Offeror has arrived at the price(s) and amounts in its proposal independently and without consultation, communication, or agreement with any other Offeror or potential Offeror.
- C. The Offeror has not disclosed the price(s), the amount of the proposal, nor the approximate price(s) or amount(s) of its proposal to any other firm or person who is an Offeror or potential Offeror for this RFP, and the Offeror shall not disclose any of these items on or before the proposal submission deadline specified in the Calendar of Events of this RFP.
- D. The Offeror has not attempted, nor will it attempt, to induce any firm or person to refrain from submitting a proposal on this contract, or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal or other form of complementary proposal.
- E. The Offeror makes its proposal in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.

- F. To the best knowledge of the person signing the proposal for the Offeror, the Offeror, its affiliates, subsidiaries, officers, directors, and employees are not currently under investigation by any governmental agency and have not in the last **five** years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to bidding or proposing on any public contract, except as the Offeror has disclosed in its proposal.
- G. To the best of the knowledge of the person signing the proposal for the Offeror and except as the Offeror has otherwise disclosed in its proposal, the Offeror has no outstanding, delinquent obligations to the Commonwealth including, but not limited to, any state tax liability not being contested on appeal or other obligation of the Offeror that is owed to the Commonwealth.
- H. The Offeror is not currently under suspension or debarment by the Commonwealth, any other state or the federal government, and if the Offeror cannot so certify, then it shall submit along with its proposal a written explanation of why it cannot make such certification.
- I. The Offeror has not made, under separate contract with the Issuing Office, any recommendations to the Issuing Office concerning the need for the services described in its proposal or the specifications for the services described in the proposal.
- J. Each Offeror, by submitting its proposal, authorizes Commonwealth agencies to release to the Commonwealth information concerning the Offeror's Pennsylvania taxes, unemployment compensation and workers' compensation liabilities.
- K. Until the selected Offeror receives a fully executed and approved written contract from the Issuing Office, there is no legal and valid contract, in law or in equity, and the Offeror shall not begin to perform.
- L. The Offeror is not currently engaged and will not during the duration of the contract engage, in a boycott of a person or an entity based in or doing business with a jurisdiction which the Commonwealth is not prohibited by Congressional statute from engaging in trade or commerce.

I-24. Notification of Selection.

- A. **Contract Negotiations.** The Issuing Office will notify all Offerors in writing of the Offeror selected for contract negotiations after the Issuing Office has determined, taking into consideration all of the evaluation factors, the proposal that is the most advantageous to the Issuing Office.

B. Award. Offerors whose proposals are not selected will be notified when contract negotiations have been successfully completed and the Issuing Office has received the final negotiated contract signed by the selected Offeror.

- I-25. Debriefing Conferences.** Upon notification of award, Offerors whose proposals were not selected will be given the opportunity to be debriefed. The Issuing Office will schedule the debriefing at a mutually agreeable time. The debriefing will not compare the Offeror with other Offerors, other than the position of the Offeror's proposal in relation to all other Offeror proposals. An Offeror's exercise of the opportunity to be debriefed does not constitute nor toll the time for filing a protest (See **PART I, Section I-26** of this RFP).
- I-26. RFP Protest Procedure.** The RFP Protest Procedure is on the DGS website at <https://www.dgs.pa.gov/Documents/Procurement%20Forms/Handbook/Pt1/Pt%20I%20Ch%2058%20Bid%20Protests.pdf> A protest by a party that has not or has not yet submitted a proposal must be filed no later than the proposal submission deadline specified in the Calendar of Events of the RFP. Offerors may file a protest within **seven (7)** days after the protesting Offeror knew or should have known of the facts giving rise to the protest, but in no event may an Offeror file a protest later than **seven (7)** days after the date the notice of award of the contract is posted on the DGS website. The date of filing is the date of receipt of the protest. A protest must be filed in writing with the Issuing Office. To be timely, the protest must be received by **4:00 PM** on the seventh day.
- I-27. Use of Electronic Versions of this RFP.** This RFP is being made available by electronic means. If an Offeror electronically accepts the RFP, the Offeror acknowledges and accepts full responsibility to ensure that no changes are made to the RFP. In the event of a conflict between a version of the RFP in the Offeror's possession and the Issuing Office's version of the RFP, the Issuing Office's version shall govern.
- I-28. Intentionally Omitted.**
- I-29. Political Contribution Reporting.** The Public School Employees' Retirement Board has adopted a [Non-Investment Contracts and Political Contributions Policy \(2025-POL-BD-05\)](#) which requires any individual or business entity, including but not limited to a corporation, company, association, partnership, or sole proprietorship (collectively referred to as a "Business Entity") seeking to or receiving an award of a contract from PSERS to file a report of political contributions, via the Political Contribution Form, **(Appendix I, Political Contribution Form)**, which is attached hereto and made part of this RFP. The reporting made pursuant to the Board policy is in addition to, and not in lieu of, any additional reporting of political contributions that may be required by the Commonwealth of Pennsylvania under any applicable statute or policy.

The policy requires submission at both time of the Offeror's Proposal submission and again at the Recommendation of Selection for Contract Negotiations of an itemized list of all political contributions known to the Business Entity by virtue of the knowledge

possessed by every officer, director, associate, partner, limited partner, or individual owner that has been made by:

- A.** Any officer, director, associate, partner, limited partner, individual owner or members of their immediate family when the contributions exceed an aggregate of one thousand dollars (\$1,000) by any individual during the 12-month period immediately preceding submission of the report; or
- B.** Any employee or members of their immediate family whose political contribution exceeded one thousand dollars (\$1,000) during the 12-month period immediately preceding submission of the report; or
- C.** If the Business Entity does not have any political contributions during the 12-month period immediately preceding submission of the report, certification of no contributions must be made.

PART II

CRITERIA FOR SELECTION

- II-1. Mandatory Responsiveness Requirements.** To be eligible for selection, a proposal must:
- A.** Be timely received from an Offeror (see **PART I, Section I-10**); and
 - B.** Be properly signed by the Offeror (see **PART I, Section I-11.A.**); and
- II-2. Technical Nonconforming Proposals.** The two **(2)** Mandatory Responsiveness Requirements set forth in **PART II-1** above are the only RFP requirements that the Commonwealth will consider to be *non-waivable*. The Issuing Office reserves the right, in its sole discretion, to (1) waive any other technical or immaterial nonconformities in an Offeror's proposal, (2) allow the Offeror to cure the nonconformity, or (3) consider the nonconformity in the scoring of the Offeror's proposal.
- II-3. Evaluation.** The Issuing Office has selected a committee of qualified personnel to review and evaluate timely submitted proposals. The Issuing Office will notify in writing of its selection for negotiation the responsible Offeror whose proposal is determined to be the most advantageous to the Commonwealth as determined by the Issuing Office after taking into consideration all of the evaluation factors.
- II-4. Evaluation Criteria.** The following criteria will be used in evaluating each proposal and by applying the formulas set forth at the following webpage:
https://www.dgs.pa.gov/Materials-Services-Procurement/Procurement-Resources/Pages/RFP_SCORING_FORMULA.aspx
- A. Technical:** The Issuing Office has established the weight for the Technical criterion for this RFP as 65% of the total points. Evaluation will be based upon the soundness of approach, Offeror qualification, personnel qualifications, and implementation and transition planning. The final Technical scores are determined by giving the maximum number of technical points available to the proposal(s) with the highest raw technical score.
 - B. Cost:** The Issuing Office has established the weight for the Cost criterion for this RFP as 35% of the total points. The cost criterion is rated by giving the proposal with the lowest total cost the maximum number of Cost points available.
 - C. Domestic Workforce Utilization:** Points received for the Domestic Workforce Utilization criterion are bonus points in addition to the total points for this RFP. The maximum amount of bonus points available for this criterion is 3% of the total points for this RFP.

To the extent permitted by the laws and treaties of the United States, each proposal will be scored for its commitment to use domestic workforce in the fulfillment of the contract. Maximum consideration will be given to those Offerors who will perform the contracted direct labor exclusively within the geographical boundaries of the United States. or within the geographical boundaries of a country that is a party to the World Trade Organization Government Procurement Agreement. Those who propose to perform a portion of the direct labor outside of the United States and not within the geographical boundaries of a party to the World Trade Organization Government Procurement Agreement will receive a correspondingly smaller score for this criterion.

- D. Iran Free Procurement Certification and Disclosure.** Prior to entering a contract worth at least \$1,000,000 or more with a Commonwealth entity, an Offeror 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 Offerors must complete and return the Iran Free Procurement Certification form, **(Appendix C, Iran Free Procurement Certification Form)**, which is attached hereto and made part of this RFP. The completed and signed Iran Free Procurement Certification form must be submitted as part of the Technical Submittal.

See the following web page for current Iran Free Procurement list:

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

- II-5. Offeror Responsibility.** To be responsible, an Offeror must submit a responsive proposal and possess the capability to fully perform the contract requirements in all respects and the integrity and reliability to assure good faith performance of the contract.

In order for an Offeror to be considered responsible for this RFP and therefore eligible for selection for BAFOs or selection for contract negotiations:

- A.** The total score for the technical submittal of the Offeror’s proposal must be greater than or equal to 75% of the **available technical points**; and
- B.** The Offeror’s financial information must demonstrate that the Offeror possesses the financial capability to assure good faith performance of the contract. The Issuing Office will review the Offeror’s previous three financial statements, any additional information received from the Offeror, and any other publicly available financial information concerning the Offeror and assess each Offeror’s financial capacity based

on calculating and analyzing various financial ratios, and comparison with industry standards and trends.

An Offeror who fails to demonstrate sufficient financial capability to assure good faith performance of the contract as specified herein may be considered by the Issuing Office, in its sole discretion, for BAFOs or contract negotiation contingent upon such Offeror providing contract performance security for the first contract year cost proposed by the Offeror in a form acceptable to the Issuing Office. Based on the financial condition of the Offeror, the Issuing Office may require a certified or bank (cashier's) check, letter of credit, or a performance bond conditioned upon the faithful performance of the contract by the Offeror. The required performance security must be issued or executed by a bank or surety company authorized to do business in the Commonwealth. The cost of the required performance security will be the sole responsibility of the Offeror and cannot increase the Offeror's cost proposal or the contract cost to the Commonwealth.

Further, the Issuing Office will award a contract only to an Offeror determined to be responsible in accordance with the most current version of Commonwealth Management Directive 215.9, Contractor Responsibility Program.

II-6. Final Ranking and Award.

- A.** After any BAFO process conducted, the Issuing Office will combine the evaluation committee's final technical scores, the final cost scores, and (when applicable) the domestic workforce utilization scores, in accordance with the relative weights assigned to these areas as set forth in this Part.
- B.** The Issuing Office will rank responsible Offerors according to the total overall score assigned to each, in descending order.
- C.** The Issuing Office must select for contract negotiations the Offeror with the highest overall score.
- D.** The Issuing Office has the discretion to reject all proposals or cancel the request for proposals at any time prior to the time a contract is fully executed when it is in the best interests of the Commonwealth. The reasons for the rejection or cancellation shall be made part of the contract file.

PART III

TECHNICAL SUBMITTAL

*Please ensure compliance with **PART I, Section I-12. Economy of Preparation.** Provide succinct, narrative responses that reflect your approach to service delivery.*

- III-1. Statement of the Project.** State in succinct terms your understanding of the project presented in delivery of the services required by this RFP and as outlined in **PART I, Section I-3.**

Offeror Response

- III-2. Qualifications.**

- A. Company Overview.** Provide a company overview to include information demonstrating capacity and expertise in the services requested. Information provided in this section should relate directly to the services requested as part of this RFP and not represent information accessible through sales prospectus or public websites.

Offeror Response

- B. Prior Experience.** Describe your experience in designing, managing, and administering elections for governmental or private sector clients. Include information specific to the nature, size, and complexity of the elections. The dates that the projects spanned should be included. Experience shown should be work done by individuals who will be assigned to this Project as well as that of your company. Studies or projects referred to must be identified and the name of the customer shown, including the name, address, and telephone number of the responsible official of the customer, company, or agency who may be contacted.

Proposals must include a sample of ballot packages, which would be of the kind proposed for PSERS' elections.

Offeror Response

- C. References.** Provide a minimum of **three (3)** references for projects for similarly situated clients. References must be identified with the name of the customer shown and include the mailing and email addresses of the responsible official of the customer, company or agency who may be contacted. Relevant related experience should also include similar public sector clients.

Offeror Response

- D. Personnel.** Describe in narrative form the number of executive and professional personnel who will be directly engaged in the work and indicate where these personnel will be physically located during the time they are engaged in the Project. For key personnel, such as account lead, include the employee's name, title, and through a resume or similar document, the Project key personnels' education and experience in serving similarly situated clients or customers. Indicate the responsibilities each will have in this Project (percent of total staff time by resource is recommended) and how long each has been with your company.

Offeror Response

- E. Subcontractors.** To the extent any work enumerated in this Proposal will be subcontracted, this response should document the intended subcontractors and services each will provide. The selected Offeror is prohibited from subcontracting or outsourcing any part of this Project without the express written approval from the Commonwealth. Upon award of the contract resulting from this RFP, subcontractors included in the proposal submission are deemed approved. For each position included in your subcontracting plan provide:

1. Name of subcontractor;
2. Primary contact name and email;
3. Address of subcontractor;
4. Description of services to be performed;
5. Number of employees by job category assigned to this project; and
6. Resumes (if appropriate and available).

Offeror Response

- III-3. Implementation and Transition.** Implementation and transition consists of activities that must take place between selection for contract negotiations and the date the selected Offeror is fully responsible for all contract activities. The objectives of the implementation and transition phase are the following:

- A. Contract Transition.** Contract Transition activities include tasks required to transfer responsibilities and operational functions smoothly to ensure continuity of service. The Offeror should provide a narrative description detailing its Transition Plan including but not limited by the elements below:

1. Negotiation team identification and timeline of contract execution events;

2. Onboarding of and knowledge transfer for key personnel;
3. System readiness (internet and telephone voting and related requirements);
4. Project risk identification and mitigation; and
5. Transition communication and reporting.

Offeror Response

- B. Contract Implementation.** Contract Implementation activities include tasks necessary to ensure the objectives of the Project are met following contract execution. The Offeror should provide a narrative description detailing its Implementation Plan including but not limited by the elements below:

1. Defining roles and responsibilities for the Project;
2. Setting Project timeline and milestones;
3. Outlining communication protocols (who, how, when);
4. Developing progress reporting; and
5. Performance monitoring.

Offeror Response

- III-4. Financial Capability.** Describe your company's financial stability and economic capability to perform the contract requirements. The Commonwealth reserves the right to request additional information to evaluate an Offeror's financial capability.

Offeror Response

- III-5. Requirements.**

- A. Data and Information Security.** PSERS takes the protection of data that may be transmitted as part of this contract very seriously. Proposers are asked to carefully review **PART V, Data and Information Security Addendum ("DISA")** which will form a part of the Contract Terms and Conditions. Beyond exceptions you may identify under **PART III, Section III-10** to the DISA, please provide a narrative summary of your internal and technical controls with regard to the handling of PSERS sensitive information.

Offeror Response

- B. Emergency Preparedness.** To support continuity of operations during an emergency, including a pandemic, PSERS requires assurance that essential contracts that provide critical business services to PSERS have planned for such an emergency and put contingencies in place to provide needed services. Describe your company's emergency preparedness strategy or attach relevant documentation supporting same.

Offeror Response

- C. Disaster Recovery.** To support continuity of operations during a potential outage of computing services, PSERS requires assurance that essential contracts that provide critical business services to the PSERS have planned for such an outage and have developed strategies and contingencies to ensure continuity of services. Describe your company's disaster recovery protocols or attach relevant documentation supporting same.

Offeror Response

- III-6. Acknowledgement of Service Requirements.** Offeror must acknowledge understanding of the following specific requirements of service provision. Offeror acknowledgement confirms to PSERS that Offeror will deliver the service requirements as prescribed in all enumerated items within Table 1-1 located in this section.

Table 1-1 Acknowledgement of Service Requirements	Offeror Acknowledgement of Understanding	
	Yes	No (Please Explain)
1. Account Manager: The Offeror must appoint an Account Manager. The Account Manager will be assigned to represent the Offeror, be responsible for oversight of the election services, and be available on a daily basis to address any and all concerns regarding the contract. The Account Manager will coordinate and manage all activity, services, and deliverables associated with the contract. The Account Manager may not be replaced or removed from this position without the written consent of the Project Manager (as defined in Part I, Section I-21).		
2. Back-up contact: The Offeror must appoint a back-up contact to temporarily assume duties of the Account Manager in his/her absence.		
3. Necessary equipment, computer software and staffing: The Offeror must provide all the equipment, computer software, and staffing necessary to receive and calculate ballots through both an IVR and the internet, and, as requested, paper ballots.		
4. Method of Election - All Paper Balloting: Offeror must acknowledge the capability to conduct all paper balloting. All ballots printed and provided to the electorate via USPS, first class mail by the Offeror. Ballots received via mail, telephonic voting, internet voting and analyzed and certified by Offeror.		

Table 1-1 Acknowledgement of Service Requirements	Offeror Acknowledgement of Understanding	
Service Requirements	Yes	No (Please Explain)
5. Method of Election - All Electronic Balloting: Offeror must acknowledge the capability to conduct all electronic balloting: All ballots created and distributed electronically to the electorate via email or by PSERS through its pension administration system. Ballots received via telephonic voting, internet voting and analyzed and certified by Offeror.		
6. Method of Election - Hybrid Paper/ Electronic Balloting: Offeror must acknowledge the capability to conduct Hybrid paper/electronic balloting: Ballots printed or created electronically and distributed via USPS first class mail or via email or by PSERS through its pension administration system. Ballots received via mail, telephonic voting, internet voting and analyzed and certified by Offeror.		
7. Method of Election – All electronic balloting conducted by PSERS: Offeror must acknowledge the capability to conduct all electronic balloting conducted by PSERS. All ballots provided to the electorate by PSERS. Ballots received via telephonic voting and internet voting and analyzed and certified by the Offeror.		
8. Balloting System: The Offeror must employ a balloting system that contains safeguards against ballot tampering.		
9. Design, procurement and distribution: Subject to the approval of the Project Manager, offeror must design, procure, and distribute all ballots, forms, materials, instructions, etc., required to conduct the elections, including the duplication and distribution of biographical data concerning the candidates and the creation of Offeror-created personal identification numbers (PINs) for purpose of electronic voting via internet or telephonic means.		
10. Mailing of ballot package: If PSERS directs paper or hybrid paper/electronic balloting, Offeror must mail directly to each eligible voter in accordance with PSERS' time schedules, a ballot package to include: voting dates, candidates' biographical data, PSERS-provided numeric member identified and Offeror-created PIN number; and, instructions on how to vote by IVR or through the internet. The packet should also include contact information for Offeror's call center in the event assistance is required.		
11. Mail processing and sorting services: Offeror must provide mail processing and sorting services to capture maximum automation discounts. The business reply envelope must be designed to permit PSERS participation in the BRMAS (Business Reply Mail Accounting System).		
12. Ballot election release time: All ballots in any election must be released by the Offeror on the same date.		
13. Ballot weight: All ballots must be constructed so that no ballot weighs more than one (1) ounce.		
14. Change of Address notifications: PSERS participates in the USPS address corrections service and would prefer to continue to utilize the same. Offeror must provide to PSERS all change of address notifications received from the USPS as soon as received.		
15. Voter inquiries: Offeror must develop a methodology, subject to approval of the Project Manager, to answer inquiries from voters who are eligible to vote but did not receive a ballot. A telephone number must be provided at no cost to the voters in the event any portion of the ballot packet is missing or damaged.		
16. Lost, destroyed or not received ballots: The Offeror must respond to, and re-mail packages related to, requests for duplicate ballot packages that have been lost, destroyed, or not received by the voter.		

Table 1-1 Acknowledgement of Service Requirements	Offeror Acknowledgement of Understanding	
Service Requirements	Yes	No (Please Explain)
17. Voter questions: In response to questions from eligible voters, the Offeror may email information to the eligible voter provided they verify the identity of the eligible voter with the information provided by PSERS against information the eligible voter provides. The Offeror must maintain a log of eligible voters who were emailed information from the Offeror.		
18. Eligible voter confidentiality: The Offeror must utilize methods to ensure that the identities of eligible voters are not revealed that each voter is eligible to vote in the election, and that each eligible voter casts only one valid ballot.		

Offeror Acknowledgement (please ensure acknowledgement confirms Offeror's understanding of the requirements outlined in Part III-6, Table 1-1.)

III-7. Sample Materials. Describe in narrative (where appropriate) and provide evidence through sample documentation (i.e. templates, scripts, etc.) and/or screenshots your technical plan for accomplishing the work tasks as outlined below. Offerors are encouraged to provide creative, well-designed solutions; however, all required elements must be maintained. **Please note that the final product under the fully executed contract must be approved by the Project Manager, as described in PART I, Section I-21.A.**

- A.** Design a PSERS-specific ballot package for mailed ballots which contains at minimum the following required elements:
 - 1.** Notification of the election and associated timeline;
 - 2.** Specific details on the timelines for responding to the election, regardless of voting method (USPS, telephonic, internet-based);
 - 3.** Detailed instructions for each voting method (USPS, telephonic, internet-based);
 - 4.** Detailed information for eligible voters to contact Offeror for customer assistance;
 - 5.** Biographical information for each candidate (NOTE: this information may require more than one page);
 - 6.** Offeror provided PIN for identification of eligible voter; and
 - 7.** PSERS-provided numeric member identifier for identification of eligible voter.
- B.** Design a PSERS-specific IVR telephonic solution to receive telephonic ballots and to field questions related to the election. At minimum, the solution must contain the following elements:
 - 1.** Greeting to distinguish the solution as PSERS provided;

2. IVR prompts to direct callers to cast ballots and/or to help desk agents; and
 3. Voice confirmation of ballot cast.
- C. Design a PSERS-specific internet-based solution to receive internet-based ballots which contains at minimum the following required elements:
1. Login procedure leveraging the Offeror PIN and PSERS-provided numeric member identifier to serve as multi-factor authentication for eligible voters;
 2. Specific detailed instructions for casting the ballot via the solution; and
 3. Screen prompt confirmation of ballot cast.
- D. Describe any methods (email reminders; text messages; use of QR codes, etc.) Offeror may leverage to simplify voting processes and increase the responses rate from eligible voter.
- E. Explain how both USPS, telephonic, and internet-based votes are analyzed to ensure accurate vote counts, no duplicate votes.
- F. Describe documentation associated with Offeror's election certification procedures.

Offeror Response (to the extent the response includes reference to any samples as an Appendix or Exhibit, please denote that here)

III-8. Reports and Project Control.

- A. **Reports.** Offeror should, at minimum, acknowledge the capability to create reports as indicated below.
1. **Ad Hoc Reporting.** An "as needed" report related to the contract activities and usage trends that are requested by PSERS. Such reports may include but not be limited to:
 - a. **Progress Reports:** Reports provided throughout the election cycle showing number of votes cast by voting method. PSERS' preferred approach to meeting this reporting requirement would be access to a live data source;
 - b. **Call Center Reports:** Reports detailing quantity and content of non-voting calls to the Offeror's call center;

- c. Voting Method Reports: Reports detailing voting preferences of the electorate (mail, telephonic, internet); and
 - d. Voting Trend Reports: Reports detailing demographics of electorate related to response rates and types.
2. **Problem/Project Risk Identification Report.** An “as required” report, identifying problem areas/project risks. The report should describe the problem/risk and its impact on the overall project and on each affected task. It should list possible courses of action with advantages and disadvantages of each and include Offeror recommendations with supporting rationale.
3. **Final Report.** The Final Report should include an abstract or summary of the results of the election activities, problems/risks, and recommendations related to an election, including but not limited to a breakdown of the number of members who voted, the method of voting, the number of inquiries, and the daily average of voting.

Offeror Response

B. Project Control

Offeror shall:

1. Submit to the Secretary of the Board and the Project Manager, no later than the date specified in the final approved **election** schedule, a tabulation of the votes in each election certifying to the validity and accuracy of the results. The tabulations must include total ballots distributed and processed, the number of invalid ballots by cause and the number of valid votes cast for each candidate in each election.
2. Meet the Project Manager on an as-needed basis for the purpose of finalizing the election timeline, reviewing progress, and preparing/reviewing necessary ballot materials.
3. Furnish all required forms, ballots, supplies, equipment, and facilities necessary to perform all functions agreed upon in the contract.
4. Retain in secure storage all Records in support of elections certification in accordance with **PART I, Section I-3.A.7.**

Provide attestation that your Company will meet all requirements outlined in PART III, Section III-8. B., Project Control.

III-9. Value-Added Services. Describe in narrative form any value-added services that may be provided that are in addition to the products or services requested under this RFP. Any additional products and/or professional services described under **Section III-9** will be consumed at the discretion of PSERS. If there are any additional fees associated with these value-added products or services, these fees must be included in the Value-Added Services Tab of **Appendix F – Cost Submittal**. **The fees presented in the Value-Added Services tab in this workbook are for informational purposes and will NOT be scored as part of the cost evaluation for this RFP.** The costs, however, will serve as a basis for negotiations during contract negotiations with the Selected Offeror, should PSERS desire any of these products and/or professional services.

Offeror Response

III-10. Objections and Additions to Commonwealth Standard Terms and Conditions. The Offeror will identify which, if any, of the terms and conditions contained in **PART V** it would like to negotiate and what additional terms and conditions the Offeror would like to add to the standard contract terms and conditions. **The Offeror's failure to make a submission under this paragraph will result in its waiving its right to do so later, but the Issuing Office may consider late objections and requests for additions if to do so, in the Issuing Office's sole discretion, would be in the best interest of the Commonwealth.** The Issuing Office may, in its sole discretion, accept or reject any requested changes to the standard contract terms and conditions. The Offeror shall not request changes to the other provisions of the RFP, nor shall the Offeror request to completely substitute its own terms and conditions for **PART V**. All terms and conditions must appear in one integrated contract. The Issuing Office will not accept references to the Offeror's, or any other, online guides or online terms and conditions contained in any proposal.

Regardless of any objections set out in its proposal, the Offeror must submit its proposal, including the Cost Submittal, on the basis of the terms and conditions set out in **PART V**. The Issuing Office will reject any proposal that is conditioned on the negotiation of the terms and conditions set out in **PART V** or to other provisions of the RFP.

Offeror Response

PART IV

COST SUBMITTAL

Cost Submittal. The information requested in this **PART IV** shall constitute the Cost Submittal. Cost Submittal information may not be included in the Technical Submittal. The Cost Submittal shall be submitted in a separately sealed envelope and electronically in accordance with **PART I, Section I-11** using **APPENDIX F Cost Submittal Worksheet**. The total proposed cost should be broken down into the components set forth in **APPENDIX F Cost Submittal Worksheet**. Offerors should **not** include any assumptions in their cost submittals. If the Offeror includes assumptions in its cost submittal, the Issuing Office may reject the proposal. Offerors should direct in writing to the Issuing Office pursuant to **PART I, Section I-8** of this RFP any questions related to **APPENDIX F Cost Submittal Worksheet**, in addition to whether a cost or other component is included or applies. All Offerors will then have the benefit of the Issuing Office's written answer so that all proposals are submitted on the same basis.

The total cost you are proposing shall be in accordance with the following:

1. Prices for all five (5) calendar years must be firm. Prices for years one through five should be supplied in the format provided in **Appendix F**.
2. Itemize the *cost of each ballot* package prepared and mailed to an elector.
3. Itemize the *cost to analyze* each returned ballot and provide the certifications required. Historical rates of return for the various types of elections in recent years are provided in **Appendix H**.

You will be permitted to bill for the actual number of ballots mailed and analyzed each year in accordance with your proposal for that year. The price agreed to contractually for each ballot is the only charge PSERS will pay. If any additional elections are needed during the five years you will conduct them at the price per ballot previously agreed to for other elections during that year.

The Issuing Office will reimburse the selected Offeror for work satisfactorily performed after execution of a written contract and the start of the contract term, in accordance with contract requirements, and only after the Issuing Office has issued a notice to proceed.

PART V

SAMPLE CONTRACT

EXHIBIT A	DATA AND INFORMATION SECURITY ADDENDUM
EXHIBIT B	CONTRACT TERMS AND CONDITIONS
EXHIBIT C	BAFO COST SUBMITTAL
EXHIBIT D	RFP# 2025-8
EXHIBIT E	CONTRACTOR'S TECHNICAL SUBMITTAL

(Attached electronically as a separate file.)