

# AWARD RECOMMENDATION

**Notice of Intent to Award Number:** 260000000160

**Notice of Intent to Award Date:** 2/19/2026

The Department of Technology, Management & Budget’s Procurement office has completed the evaluation of RFP 250000002251 AI Tax Compliance Software and has recommended an award to IVIX Tech, Inc. in the amount of \$10,000.

Bidders who were not recommended for the award are encouraged to schedule a debriefing session with the Solicitation Manager. The debriefing session will provide the bidder with the State’s rationale on why the bidder was not recommended for the award. The Solicitation Manager may be contacted as follows:

Patrick Russell, Solicitation Manager.

Russellp2@michigan.gov

(517) 648 -7767

**Public copies of all bidder proposals can be found here:** [DTMB - Bid Proposals \(michigan.gov\)](https://www.michigan.gov/dtmb)

**Background Information:**

This Request for Proposal (RFP) was to solicit responses for selection of a Contractor to provide an automated AI Tax Compliance solution. The term of this contract consists of a Pilot Phase, 2.5 base years and up to 7 renewal options.

**Bidders:**

The RFP was posted on SIGMA VSS on June 6, 2025, for 6 weeks. The following bidders submitted proposals by the published due date of July 21, 2025.

Bidder	Address, City, State, Zip Code	SDVOB*	GDBE**
InnoSoul, Inc	24 Fairfield Ave, Albany, NY 12205	No	No
IVIX Tech, Inc	488 Madison Avenue, Suite 1103, New York, NY 10022	No	No
Progressive Web Apps, Inc	1001 Woodward Ave, Suite 500 Detroit, MI 48226	No	No
Reason Consulting Corporation	2820 Selwyn Ave., Sute 856 Charlotte, NC 28209	No	No

\*SDVOB: Service-Disabled Veteran Owned Business

\*\*GDBE: Geographically Disadvantaged Business Enterprise

## EVALUATION SYNOPSIS

### I. Evaluation Process

A Responsible Vendor is a vendor that demonstrates it has the ability to successfully perform the duties identified by the solicitation. A Responsive proposal is one that is submitted in accordance with the solicitation instructions and meets all mandatory requirements identified in the solicitation.

#### Proposal Instructions: Evaluation Process

	Technical Criteria Name	Weight
1.	Schedule A – Statement of Work	55
2.	Schedule A – Statement of Work – Attachment 1 – Resume Templates	5
3	Contractor Questions Worksheet	10
4	Schedule A – Attachment 1 – Business Specification Worksheet	30
	<b>Total</b>	<b>100</b>

The full evaluation process is stated in the RFP Proposal Instructions.

### II. Evaluation Method

Responses to this solicitation were reviewed by the Solicitation Manager in collaboration with the Joint Evaluation Committee, which consisted of the following individuals:

Voting	Advisory
Patrick Russell, Solicitation Manager DTMB	David Bates, Bureau of Enterprise Services (BES) Director, Chief Information Officer, Treasury
Tim Gajda, Assistant Deputy Treasurer, Treasury	Kimberly Koppsch – Woods General Manager DTMB/Treasury Agency Services
Anne Cram, City Tax Bureau Director, Treasury	Roger Weyersberg, State Administrative Manager   Agency Services supporting Treasury  Client Support, Vendor Support, Treasury Wide Applications, DTMB
Lucy Pline, Business Relationship Manager, DTMB	Caroline June, State Division Administrator, Treasury

Voting	Advisory
Roslyn Branner, State Division Administrator, Treasury.	Kristine Mills, Solicitation Manager DTMB

**III. Evaluation Results**

**InnoSoul, Inc**

InnoSoul, Inc. was deemed non-responsive as they failed to submit their response in the required format as outlined in the RFP instructions. The submission did not meet the mandatory requirements and therefore could not be considered for further evaluation.

**IVIX Tech, Inc**

The Evaluation Team determined that IVIX Tech, Inc based on a score of 98.86, did meet the requirements of this RFP. This determination was accomplished by evaluating their responses to the Technical Evaluation Criteria.

**1. Schedule A – Statement of Work**

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

IT Environment - Section 4, Bidder Box 9, Applicable to State hosted cloud only: Bidder must provide a block diagram showing the discreet components at the data flow level. Optimally: Bidder should ensure that internal and external components are separately highlighted or clearly marked. Any cloud native or shared component should be clearly highlighted or labeled. In addition, the Bidder should ensure that all necessary ports and protocols are displayed. This file should be in editable or modifiable format and provided as an attachment to this solicitation.

Deficiency – Minimally Acceptable, failed to provide list of necessary ports. **0.29/0.37**

**2. Schedule A – Statement of Work**

ADA Compliance - Section 5, Bidder Box 1, Bidder must provide a description of conformance with World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) 2.1 Level AA specifications by providing a completed PAT for the Solution. If the Solution is comprised of multiple products, a PAT must be provided for each product. In addition to PATs, Bidders may include a verification of conformance certified by an industry-recognized third-party. If the Bidder is including any third-party products in the Solution, Bidder must obtain and provide the third-party PATs as well. Each PAT must state exactly how the product meets the specifications. All “Not Applicable” (N/A) responses must be fully explained. Contractor must address each standard individually and with specificity; and clarify whether conformance is achieved throughout the entire product (for example – user functionality, administrator functionality,

and reporting), or only in limited areas. A description of the evaluation methods used to support WCAG 2.1 Level AA conformance claims, including, if applicable, any third-party testing, must be provided. For each product that does not fully conform to WCAG 2.1 Level AA, Bidder must provide detailed information regarding the plan to achieve conformance, including timelines.

Bidder must provide details of how they will meet these requirements.

Deficiency – Minimally Acceptable, failed to provide details and does not meet full conformance until December 2025. **0.88/1.10**

### **3. Schedule A – Statement of Work**

Data Retention - Section 8, Bidder Box 1, Bidder must review and explain how the data retention, deletion and retrieval requirements will be met and describe its data management capabilities (storage limitations, duration, etc.).

Deficiency – Minimally Acceptable, failed to provide configurable retention parameters for the State Hosted environment. / Notes: Written request to delete things instead of configurable. Retention parameters should be automatically enforced. State hosted environment and vendor is proposing they do the deletion. **2.20/2.75**

### **4. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specifications 136, Upon termination of individual employment, the Contractor must: 2. Retrieve all security-related agency property.

Deficiency – Does not meet, Bidder failed to discuss requirement. **0.00/0.12**

### **5. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specifications 138, For external providers, Contractor: a. Establish personnel security requirements, including security roles and responsibilities.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers. **0.09/0.12**

### **6. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specifications 139, For external providers, Contractor: b. Require external providers to comply with personnel security policies and procedures established by Agencies.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in

ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers.  
**0.09/0.12**

**7. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specifications 140, For external providers, Contractor: c. Document personnel security requirements.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers.  
**0.09/0.12**

**8. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specifications 141, For external providers, Contractor: d. Require external providers to notify Agencies of any personnel transfers or terminations of personnel who possess SOM property or who have system access.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers.  
**0.09/0.12**

**Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specifications 184, For external system services, the Contractor must: a. Comply with organizational information security and privacy requirements and employ appropriate security controls in accordance with applicable federal laws, executive orders, directives, policies, regulations, standards and guidance.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers. **0.09/0.12**

**9. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specification 185, For external system services, the Contractor must: b. Define and document government oversight and user roles and responsibilities.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers. **0.09/0.12**

#### **10. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

Business Specification 186, For external system services, the Contractor must: c. Employ processes, method, and techniques in accordance with service-level agreements to monitor control compliance on an ongoing basis.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers. **0.09/0.12**

#### **1. Schedule A – Statement of Work, Attachment 1, Business Specifications Worksheet**

**Business Specification 187**, For external system services, the Contractor must identify the functions, ports, protocols and other services required for the use of such services.

Deficiency - Minimally Acceptable, Bidder failed to understand the question. The bidder will have external providers that they need to leverage, and the State is interested in ensuring the security terms that the bidder has agreed to are passed along to their suppliers. In example, cell phone providers, the office's internet connection suppliers. **0.09/0.12**

**Total Score: 98.86/100**

#### **Progressive Web Apps, Inc**

The bidder was deemed non-responsive for the following reasons:

- Did not review or acknowledge the required Terms and Conditions.
- Failed to complete SCHEDULE A – ATTACHMENT 1 – Business Specification Worksheet as requested in the solicitation.

As a result, the submission did not meet the mandatory requirements outlined in the RFP.

#### **Reason Consulting Corporation**

The bid was submitted as a custom solution rather than a Commercial Off-The-Shelf (COTS) or Software-as-a-Service (SaaS) offering, as required by the RFP. This did not meet the mandatory

specifications outlined in the solicitation and therefore the bid was disqualified from further consideration.

**IV. Technical Evaluation Summary**

Selection Criteria		IVIX Tech, Inc
1	Schedule A - Statement of Work	54.16
2	Personnel Resumes	5
3	Vendor Question Worksheet	10
4	Business Specification Worksheet	29.70
<b>Total</b>		<b>98.86</b>

**V. Pricing Summary**

Pricing was evaluated for the bidders who passed technical. The following is a summary of their price proposals:

Phase	Scope	Term	Period	Payment Milestone	Payment Type
Pilot	Pilot	9 months	3/1/2026-11/30/2026	Contract Ratification	Licensing Fees

BY1	Implementation Base Year 1		Start of BY 1	BY 1 Initiation	Implementation Fees
BY1	Support Services Base Year 1		Start of BY 1	BY 1 Initiation	Support Services Fees
BY1	Enterprise Base Year 1: Release 1	3 months	12/1/2026-2/28/2027	BY 1 Release 1	Licensing Fees
BY1	Enterprise Base Year 1: Release 2	3 months	3/1/2027-5/31/2027	BY 1 Release 2	Licensing Fees
BY1	Enterprise Base Year 1: Release 3	3 months	6/1/2027-8/31/2027	BY 1 Release 3	Licensing Fees
BY1	Enterprise Base Year 1: Release 4	3 months	9/1/2027-11/30/2027	BY 1 Release 4	Licensing Fees
<b>Total BY1</b>			<b>12/1/2026-11/30/2027</b>		

BY2	Implementation Base Year 2		Start of BY 2	BY 2 Initiation	Implementation Fees	1
BY2	Support Services Base Year 2		Start of BY 2	BY 2 Initiation	Support Services Fees	1
BY2	Enterprise Base Year 2: Release 1	3 months	12/1/2027-2/29/2028	BY 2 Release 1	Licensing Fees	3
BY2	Enterprise Base Year 2: Release 2	3 months	3/1/2028-5/31/2028	BY 2 Release 2	Licensing Fees	6
BY2	Enterprise Base Year 2: Release 3	3 months	6/1/2028-8/31/2028	BY 2 Release 3	Licensing Fees	9
BY2	Enterprise Base Year 2: Release 4	3 months	9/1/2028-11/30/2028	BY 2 Release 4	Licensing Fees	1
<b>Total BY2</b>			<b>12/1/2027-11/30/2028</b>			

BY2.5	Implementation Base Year 2.5		Start of BY 2.5	BY 2.5 Initiation	Implementation Fees	1
BY2.5	Support Services Base Year 2.5		Start of BY 2.5	BY 2.5 Initiation	Support Services Fees	1
BY2.5	Enterprise Base Year 2.5: Release 1	3 months	12/1/2028-2/28/2029	BY 2.5 Release 1	Licensing Fees	3
BY2.5	Enterprise Base Year 2.5: Release 1	3 months	3/1/2029-5/31/2029	BY 2.5 Release 2	Licensing Fees	6
<b>Total BY2.5</b>			<b>12/1/2028-5/31/2029</b>			

OY1	Implementation OY 1		Start of OY 1	OY 1 Initiation	Implementation Fees	6
OY1	Support Services OY 1		Start of OY 1	OY 1 Initiation	Support Services Fees	6
OY1	Option Year 1: Release 1	3 months	6/1/2029-8/31/2029	OY 1 Release 1	Licensing Fees	9
OY1	Option Year 1: Release 2	3 months	9/1/2029-11/30/2029	OY 1 Release 2	Licensing Fees	1
OY1	Option Year 1: Release 3	3 months	12/1/2029-2/28/2030	OY 1 Release 3	Licensing Fees	3
OY1	Option Year 1: Release 4	3 months	3/1/2030-5/31/2030	OY 1 Release 4	Licensing Fees	6

<b>Total OY1</b>			<b>6/1/2029-5/31/2030</b>		
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OY2	Implementation OY 2		Start of OY 2	OY 2 Initiation	Implementation Fees
OY2	Support Services OY 2		Start of OY 2	OY 2 Initiation	Support Services Fees
OY2	Option Year 2: Release 1	3 months	6/1/2030-8/31/2030	OY 2 Release 1	Licensing Fees
OY2	Option Year 2: Release 2	3 months	9/1/2030-11/30/2030	OY 2 Release 2	Licensing Fees
OY2	Option Year 2: Release 3	3 months	12/1/2030-2/28/2031	OY 2 Release 3	Licensing Fees
OY2	Option Year 2: Release 4	3 months	3/1/2031-5/31/2031	OY 2 Release 4	Licensing Fees
<b>Total OY2</b>			<b>6/1/2030-5/31/2031</b>		

OY3	Implementation OY 3		Start of OY 3	OY 3 Initiation	Implementation Fees
OY3	Support Services OY 3		Start of OY 3	OY 3 Initiation	Support Services Fees
OY3	Option Year 3: Release 1	3 months	6/1/2031-8/31/2031	OY 3 Release 1	Licensing Fees
OY3	Option Year 3: Release 2	3 months	9/1/2031-11/30/2031	OY 3 Release 2	Licensing Fees
OY3	Option Year 3: Release 3	3 months	12/1/2031-2/29/2032	OY 3 Release 3	Licensing Fees
OY3	Option Year 3: Release 4	3 months	3/1/2032-5/31/2032	OY 3 Release 4	Licensing Fees
<b>Total OY3</b>			<b>6/1/2031-5/31/2032</b>		

OY4	Implementation OY 4		Start of OY 4	OY 4 Initiation	Implementation Fees
OY4	Support Services OY 4		Start of OY 4	OY 4 Initiation	Support Services Fees
OY4	Option Year 4: Release 1	3 months	6/1/2032-8/31/2032	OY 4 Release 1	Licensing Fees
OY4	Option Year 4: Release 2	3 months	9/1/2032-11/30/2032	OY 4 Release 2	Licensing Fees
OY4	Option Year 4: Release 3	3 months	12/1/2032-2/28/2033	OY 4 Release 3	Licensing Fees
OY4	Option Year 3: Release 4	3 months	3/1/2033-5/31/2033	OY 4 Release 4	Licensing Fees

<b>Total OY4</b>			<b>6/1/2032-5/31/2033</b>		
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OY5	Implementation OY 5		Start of OY 5	OY 5 Initiation	Implementation Fees
OY5	Support Services OY 5		Start of OY 5	OY 5 Initiation	Support Services Fees
OY5	Option Year 5: Release 1	3 months	6/1/2033-8/31/2033	OY 5 Release 1	Licensing Fees
OY5	Option Year 5: Release 2	3 months	9/1/2033-11/30/2033	OY 5 Release 2	Licensing Fees
OY5	Option Year 5: Release 3	3 months	12/1/2033-2/28/2034	OY 5 Release 3	Licensing Fees
OY5	Option Year 5: Release 4	3 months	3/1/2034-5/31/2034	OY 5 Release 4	Licensing Fees
<b>Total OY5</b>			<b>6/1/2033-5/31/2034</b>		

OY6	Implementation OY 6		Start of OY 6	OY 6 Initiation	Implementation Fees
OY6	Support Services OY 6		Start of OY 6	OY 6 Initiation	Support Services Fees
OY6	Option Year 6: Release 1	3 months	6/1/2034-8/31/2034	OY 6 Release 1	Licensing Fees
OY6	Option Year 6: Release 2	3 months	9/1/2034-11/30/2034	OY 6 Release 2	Licensing Fees
OY6	Option Year 6: Release 3	3 months	12/1/2034-2/28/2035	OY 6 Release 3	Licensing Fees
OY6	Option Year 6: Release 4	3 months	3/1/2035-5/31/2035	OY 6 Release 4	Licensing Fees
<b>Total OY6</b>			<b>6/1/2034-5/31/2035</b>		

OY7	Implementation OY 7		Start of OY 7	OY 7 Initiation	Implementation Fees
OY7	Support Services OY 7		Start of OY 7	OY 7 Initiation	Support Services Fees
OY7	Option Year 7: Release 1	3 months	6/1/2035-8/31/2035	OY 7 Release 1	Licensing Fees
OY7	Option Year 7: Release 2	3 months	9/1/2035-11/30/2035	OY 7 Release 2	Licensing Fees

OY7	Option Year 7: Release 3	3 months	12/1/2035-2/29/2036	OY 7 Release 3	Licensing Fees
<b>Total OY7 (9 months)</b>			<b>6/1/2035-2/29/2036</b>		

<b>TOTAL PILOT (.75 YEARS)</b>	<b>\$10,000</b>
<b>TOTAL BASE YEARS (2.5 YEARS)</b>	<b>\$8,912,500</b>
<b>TOTAL OPTION YEARS (6.75 YEARS)</b>	<b>\$26,450,946</b>
<b>TOTAL PILOT + BASE + OPTIONS (10 YEARS)</b>	<b>\$35,373,446</b>
<b>NUMBER OF RELEASES</b>	<b>37</b>

**VI. Negotiations**

The State engaged IVIX Tech, Inc. and agreements on terms were reached. After entering negotiations, IVIX Tech, Inc. was able to reduce their proposal by \$3,916,784.89 and extend the pilot period an additional 3 months.

**VII. Award Recommendation**

The JEC recommends awarding the contract to IVIX Tech, Inc. for an amount not to exceed \$10,000 for the pilot phase. Upon successful completion and evaluation of the pilot, the State may choose to extend the contract into a longer-term agreement.