

AWARD RECOMMENDATION

Notice of Intent to Award Number: 230000000101

The Department of Technology, Management and Budget office has completed the evaluation of RFP 220000001589 for the Student Financial Services System (MET) and has recommended an award to Intuition College Savings Solutions, LLC in the amount of \$1,745,202.00, pending State Administrative Board approval, if applicable. More information on the State Administrative Board can be found at: [State Administrative Board](#).

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:

Jennifer May, Solicitation Manager.

Mayj7@michigan.gov

517-242-6664

Background Information:

This Request for Proposal (RFP) was to solicit responses for selection of a Contractor to provide a Michigan Education Trust (MET) Application. The term of this contract is 3 years, with up to 2 one-year renewal options.

Bidders:

The RFP was posted on SIGMA VSS on 3/10/2022, for 33 days. The following bidders submitted proposals by the published due date of 4/11/2022.

Bidder	Address, City, State, Zip Code	SDVOB*
Intuition College Services, LLC	9428 Baymeadows Road, Suite 600 Jacksonville, FL 32256	No

*SDVOB: Service-Disabled Veteran Owned Business

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: Mandatory Minimum Requirements

Minimum Requirements
<ul style="list-style-type: none"> Bidder must have minimum 5 years' experience with administering software related to 529 prepaid programs as defined in Section 529 of the Internal Revenue Code.

Proposal Instructions: Evaluation Process

Evaluation Criteria Name	Evaluation Weight
Schedule A – Statement of Work (Table 1 scored separately)	35.00
Schedule A - Table 1 - Business Specification Worksheet	40.00
Attachment 1 - Resume Templates	10.00
Vendor Questions Worksheet	15.00
Total Weight	100.00

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

II. Evaluation Method

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

Voting	Advisory
Jennifer May (DTMB)	Heather Barthelmes (Treasury)
Diane Brewer (Treasury)	Mike Bartkowiak (DTMB)
Donald Fewes (Treasury)	Amy Dinstbier (Treasury)
Robin Loft (Treasury)	Lance Kingsbury (Treasury)
Megan Patino (Treasury)	Alex Lilley (DTMB)
Lucy Pline (DTMB)	Matthew Wolcott (Treasury)

III. Evaluation Results

A. Intuition College Savings, LLC

The Evaluation Team determined that Intuition College Savings, LLC, based on a score of 84.65, did meet the requirements of this RFP This determination was accomplished by evaluating their responses to the Technical Evaluation Criteria.

Michigan Education Trust – Intuition College Savings, LLC	Possible Points	Technical Score/100	Comments
Schedule A - Statement of Work	35	28.49	<p>#10 Co-Location provider not listed under facilities but is listed. Partial Point Deduction: .103</p> <p>#12 Bidder did not provide information on compliance with ADA. Partial Point Deduction: 1.544</p> <p>#15 – Single Sign on is not supported. Point Deduction: 2.059</p> <p>#25 List of features that can be performed via a mobile app not provided. Partial Point Deduction: .422.</p> <p>#26 Bidder did not explain how the integration will occur and the file exchange with TIA is not currently functional. Partial Point Deduction: 1.030</p>
Schedule A – Table 1, Business Specification Worksheet	40	36.160	<p>#60 The system currently does not have the functionality to change the contract number. Partial Point Deduction: .160</p> <p>#113 The system must allow purchasers, beneficiaries, and appointees to download letters and tax documents online.</p>

		<p>Requirement not available without additional change order process. Point Deduction: .320</p> <p>#114 The system must allow purchasers, beneficiaries, and appointees to request all letters be delivered electronically instead of mail. Requirement not available without additional change order process. Point Deduction: .320</p> <p>#115 The system must include a texting platform to communicate with MET participants. Requirement not available without additional change order process. Point Deduction: .320</p> <p>#122 The benefits and the schedule of payment will be viewable online by the customer after the MET staff approval. Requirement not met. Point Deduction: .320</p> <p>#123 The system must allow the formulas to calculate contract benefits and payment schedules to be configurable by MET staff. (Note Configurable means that no code changes will be required). Code changes would be required to configure these elements. Partial Point Deduction: .160</p> <p>#125 - Schools are not able to see history or details. Point Deduction: .240</p> <p>#126 The system must allow higher education institutions to submit changes to student enrollment data for students</p>
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		<p>enrolled at that institution online. Requirement not provided. Point Deduction: .320</p> <p>#140 School payment information does not show check number. Partial Point Deduction: .080</p> <p>#141 The system must allow MET staff to make edits to contracts as needed, including updating credit hours, payment schedules, payment amounts/dates, maturity status, etc. Intuition can update these fields but MET staff cannot. Partial Point Deduction: .160</p> <p>#148 The system must allow higher education institutions to have the capability to modify the invoice generated online. Requirement not met. Point Deduction: .320</p> <p>#163 The system must allow a mechanism to permit the customer to opt out of email communications. Requirement not available without change order process. Point Deduction: .320</p> <p>#165 The system must send a reminder email to the customer each year for four years before contract expires, until the contract is depleted or expired. The system does not send the email to the customer. They provide a database and MET staff manages notices. Point Deduction: .160</p>
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			<p>#168 The system must allow for letters to be modified by MET staff. MET staff is not able to modify letters. Partial Point Deduction: .240</p> <p>#169 The system must allow for a substitute 1099Q in place of the IRS 1099Q to display a list of payments made on the contract and remaining balance. System currently does not meet this requirement. Point Deduction: .320</p> <p>#170 Solution does not interface with all requested entities. Point Deduction: .080</p>
Vendor Questionnaire Worksheet	15	15.000	Contractor Security Officer does not have certification. Partial Point Deduction: 5.00
Attachment 1, Resume Template	10	5.000	
TOTAL	100	84.650	

Total Score:84.650/100

IV. Oral Presentations/Demonstrations

Oral Presentations/Demonstrations allowed the State to confirm and adjust scoring accordingly.

V. Pricing Summary

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

Deliverable		Intuition College Savings, LLC
1	Active Account Servicing Fee (per month per account)	\$0.65
2	Inactive Account Servicing Fee (per month per account)	\$0.19
	Total Price	\$1,745,202.00

VI. Award Recommendation

Award recommendation is made to the responsive and responsible Bidder who offers the lowest price to the State of Michigan. Low price is determined by the Bidder who meets the requirements and offers the lowest overall price as demonstrated by its proposal.

Award Recommendation is made to Intuition College Savings, LLC in the amount of \$1,745,202.00.