



Appendix B: RFP 25-MAS-0426 Completion Checklist

The documents and information below are required for proposal submission to be considered complete. Failure to submit the required documents and information may result in a proposal being deemed non-responsive.

- Ability to meet the anticipated beginning date of **July 1, 2026**. Any anticipated risks to this timeline must be disclosed.
- Executive Summary
- Summary of Experience & Qualifications
- Response to Evaluation Criteria
- Attachment A – Title Page
- Attachment B – Vendor Acknowledgement
- Attachment C – Insurance or Bonding Requirements
- Attachment D – IDEA Conflict of Interest Form
- Attachment E – Texas Ethics Commission Form CIQ
- Attachment F – Felony Conviction Disclosure Statement
- Attachment G – Certification Regarding Lobbying
- Attachment H – Contract Provisions for Contracts Involving Federal Funds
- Attachment I – Reference Sheet
- Attachment J – Litigation, Terminations, Claims
- Attachment K – Proposed Pricing (all tabs completed following *Price Sheet Response Instructions*)
- Attachment L – IRS Form W-9
- Attachment M – Deviations and Exceptions
- Attachment N – Certification Regarding Drug-Free Workplace
- Attachment O – Child Support Certification
- Appendix A – RFP Questionnaire
- Appendix B – RFP Completion Checklist
- Description of Proposal
- Implementation & Transition Plan-Marked as Exhibit C (Includes: Timeline for onboarding and system setup, Data migration and testing approach, Member communication support, and Coordination with IDEA’s broker and internal teams)
- AM Best Rating and/or most recent published financial statement- Marked as Exhibit D
- Sample Standard Reporting Package.
- Respondent has read, understands, and agrees to the RFP requirements, including, but not limited to, the scope of work, vendor requirements, contract requirements, pricing requirements, timeline requirements, and documentation requirements as outlined in this RFP.
- By selecting this checkbox, the vendor acknowledges and agrees to the terms and conditions outlined in this solicitation document.**

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative