

REQUEST FOR QUOTE (RFQ)

RFP NUMBER: EDUR201302100

DATE ISSUED: July 25, 2012

ELIGIBILITY: STS (State Term Schedule) Vendors Only

The State of Ohio Department of Education is requesting Price Quotes for:

TITLE: *ODE WEBSITE REDESIGN IMPLEMENTATION PHASE*

INQUIRY PERIOD BEGINS: July 25, 2012

INQUIRY PERIOD ENDS: August 3, 2012 8:00 A.M. Eastern

QUOTE DUE DATE: August 10, 2012 Time: 5:00 PM

QUOTE OPENING DATE: August 13, 2012

ESTIMATED AWARD DATE: August 31, 2012

PROJECT REQUEST FOR QUOTE

PROJECT INFORMATION

PROJECT REQUEST

This Request of Quote (RFQ) identifies work to be performed under the anticipated contract to provide the ODE Communications and Outreach Office with resources to design and implement a website that meets the needs of the agency and the project, based on recommendations previously provided in the ODE Website Redesign – Analysis Phase. Completion of the entire Implementation phase will entail a fully functional internet website (replacing the existing website <http://education.ohio.gov>), the adaptation of appropriate governance, and the acquisition and deployment of recommended software. Services will be rendered, and deliverable items completed in the 2013 fiscal year. The work will take place starting on or after 8/1/2012 and ending by or before 6/30/2013.

The vendor agrees to provide the bulk of the following services at the primary site of Ohio Department of Education 25 South Front St, Columbus, OH 43215; and State Data applicable to this contract will be maintained or made available at 25 South Front St, Columbus, OH 43215.

The vendor should have demonstrated extensive experience in implementation of web portals, both public facing and secured; enterprise content management solutions; performance testing and tuning; user acceptance testing; creation of detailed end user documentation; training; deployment planning; and launch support for engagements of similar size and scope.

During the performance of this contract, the vendor shall not change the location(s) of the country where services are performed, or change the location(s) of the country where the data are maintained or made available without prior written approval of the Department, if applicable.

The work will be deemed successful if the deliverables defined herein are completed and if these deliverables are available to fulfill their intended purposes. Prospective vendors will/may be interviewed prior to contract award to ensure knowledge and capacity to meet the project requirements. This project will be classified as a competitive fixed bid proposal. Payment will be based on acceptance of each deliverable.

Contingent upon continued funding and approval by the State, this contract may be renewed in Fiscal Year 2014, beginning July 1, 2013 and ending June 30, 2014, under the same terms and conditions if necessary.

Project Background

In 2011, the Communications and Outreach team outlined the following strategies/tactics relative to the ODE website:

- Commit to customer-centered design
- Follow research-based Web best practices
- Ensure audience appropriateness
- Provide relevant and timely content delivery
- Develop clear information architecture
- Build public good will and customer loyalty

Approval was sought and granted in late 2011 to proceed with a detailed analysis of the website. An independent team was engaged for the Analysis Phase, which also included recommendations on how ODE should proceed to fulfill their goals through a complete implementation plan. A project kickoff meeting was conducted on February 2012, followed by 59 interviews and other relevant activities with SMEs and stakeholders. The project team presented and discussed the findings and recommendations to the ODE Executive Team in May 2012.

The Analysis Phase produced a series of work products and deliverables which have been considered in defining the scope of this implementation effort. These deliverables have been made available for the review and consideration of all prospective bidders. To view and download these materials, visit:

ftp://ftp.ode.state.oh.us/ODEMediaWeb/Web_RFQ/

Based on the Analysis Phase recommendation, ODE has chosen to acquire the Kentico content management software early in the Implementation phase and as such, this software should be considered as the baseline content management system software to implement the remainder of the project.

Note – In the case of any discrepancies between the recommendations made within the work product and deliverable documents and the requirements defined within this RFQ the RFQ is to be considered the correct source of information.

Business Drivers

The Ohio Department of Education has experienced challenges with its Geodocs content management system. Surveys have indicated that users experience frustration with the website as it now exists. Given that the ODE website is the primary communication tool of the agency, it is imperative that users be able to access the information and services they need through a logical and consistent user interface. Further, it has already been decided by the agency to not renew the Geodocs ongoing maintenance agreement.

Objectives

ODE's website is in need of an overhaul that will better equip the agency to meet changing technology requirements, to redesign its look and feel, to enable CMS managers and contributors to provide improved governance, to ensure best practices for usability and web accessibility, to thoroughly review information structure, to improve integration with other external applications and to establish effective measurements and tracking.

A redesigned and reorganized ODE website will more effectively present information and allow interactivity that will result in the following:

- Information that is easy-to-find, understand and act upon
- A more direct route to agency resources and staff and improved efficiencies for ODE
- A more appealing look and feel that promotes visitor loyalty
- A clear view of website performance and paths to improvement through analytics
- Improved relationship with ODE and its constituents and improved standing in the web community

Scope

Scope Inclusions

The following items provide additional detail on the scope of the ODE Website Redesign and content management system. The implementation plan is based the recommended strategy and technology that were created out of the analysis of these areas. The solution is based on a combination of user requirements, business processes, technology, and policies to create a portal strategy that will accommodate ODE’s various user groups as well as future technology needs. The high level solutions are focused on the following:

1. Implement a new taxonomy based on user groups and topics in place of ODE organizational structure
2. Adhere to recommended communication guidelines to align website content with the target audience
3. Design a website based on web page structure recommendations that simplifies vocabulary and navigation
4. Adopt and configure a new content management system to ease the time required to maintain the website and enforces new standards, workflows, policies and governance
5. Define and follow website policy and governance
6. Implement the detailed activities defined below according to project phases.

The anticipated activities in the Planning Phase of the Implementation project will include:

| Project Phase/Activity | Vendor Resources |
|--|-------------------------------------|
| Planning | |
| Project Management | Project Manager |
| Perform Content Inventory | Business Systems Analyst 1 (BSA 1) |
| | BSA 2 |
| | Web Designer |
| Content Inventory Approval | Functional Lead/BA |
| | Web Designer |
| | BSA 1 |
| Identify Website Templates | Web Designer |
| Identify Workflows | BSA 2 |
| Gather CMS Configuration Requirements | Web Designer |
| | BSA 1 |
| | CMS Technical Lead |
| Set-up CMS Architecture and Environments | CMS Technical Lead |
| Develop Website Policies | Functional Lead/BA |
| | Web Designer |
| Develop Website Governance Model | Functional Lead/BA |

| | |
|---|--------------------|
| Organizational Change Management (OCM) Stake Holder Analysis & Organizational Impact Assessment (Create OCM Strategy) | OCM Analyst |
| CMS Tool, Workflow & Policy Training Plan | BSA 2 |
| | Functional Lead/BA |
| | OCM Analyst |

Activities in the Design phase of the Implementation project will include:

| Project Phase \ Activity | Vendor Resources |
|---|-------------------------|
| Design | |
| Project Management | Project Manager |
| Map Content Inventory to Taxonomy | Web Designer |
| | BSA 1 |
| Configure CMS | CMS Technical Lead |
| Design Website Templates | Web Designer |
| Design Workflows | BSA 2 |
| Usability Testing | Functional Lead/BA |
| Create OCM and Communication Deliverables | OCM Analyst |
| Create CMS Tool, Workflow & Policy Training | OCM Analyst |
| | Functional Lead/BA |

Activities in the Build and Test phase of the Implementation project will include:

| Project Phase \ Activity | Vendor Resources |
|---|-------------------------|
| Build & Test | |
| Project Management | Project Manager |
| Develop Templates & Create ODE Web Part Library | Web Designer |
| | CMS Technical Lead |
| Configure and Implement Workflows | BSA 2 |
| Workflow QA Testing | BSA 1 |
| Website Usability Testing | BSA 1 |
| Implement Governance Model | Functional Lead/BA |
| Deliver CMS Tool, Workflow & Policy Training | OCM Analyst |
| Develop Internal and External Communication | OCM Analyst |

Activities in the Conversion phase of the Implementation project will include:

| Project Phase \ Activity | Vendor Resources |
|---------------------------------|-------------------------|
| Conversion | |
| Project Management | Project Manager |
| Re-Format Web Pages | Designer |
| Recast Documents | Functional Lead/BABSA 1 |
| | OCM Analyst |
| Convert Document to HTML | BSA 2 |
| Move Documents | BSA 2 |
| Move Web Pages | CMS Technical Lead |
| Archive Content | CMS Technical Lead |
| Content Migration | CMS Technical Lead |

Activities in the Performance and Usability Testing phase of the Implementation project will include:

| Project Phase \ Activity | Vendor Resources |
|---|-------------------------|
| Performance & Usability Testing | |
| Project Management | Project Manager |
| User Acceptance Test Planning | BSA 1 |
| User Acceptance Execution | Functional Lead/BA |
| | BSA 1 |
| Updates based on User Acceptance Test Results | BSA 1 |
| | Web Designer |
| | CMS Technical Lead |
| Performance Testing | CMS Technical Lead |

Activities in the Rollout and Stabilization phase of the Implementation project will include:

| Project Phase \ Activity | Vendor Resources |
|---|-------------------------|
| Rollout & Stabilization | |
| Project Management | Project Manager |
| Execute Internal and External Communication Plan & Training | OCM Analyst |
| Deploy "Website" System | CMS Technical Lead |
| Conduct Post-Go Live Support | CMS Technical Lead |
| | Web Designer |

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|----------------------------|--------------------|--|
| Execute Knowledge Transfer | BSA 1 | |
| | BSA 2 | |
| | CMS Technical Lead | |
| Compile Lessons Learned | Functional Lead/BA | |
| Closeout Project | Functional Lead/BA | |

Scope

Scope Exclusions

- ODE will be acquiring the Kentico content management software early in the Implementation phase; this software purchase should not be included in cost estimates by vendors for this project.

RISK IDENTIFICATION

The following risks have been identified for the project. These risks will have to be discussed at the start of the project and monitored throughout the remainder of the project.

- If ODE elects to implement only a portion of the recommendations, it may put the proposed website strategy at risk
- If ODE does not designate resources to establish and enforce the content management process, then it may be impossible to adhere to website policies and standards
- If ODE tools do not participate in the single sign on initiative, then users will continue to have multiple logins
- If ODE does not invest in performing the content inventory upfront, the estimates for the website conversion will be based on order of magnitude estimates

ASSUMPTIONS/CONSTRAINTS

Assumptions:

- Implementation of the full project scope is possible within the given time and cost constraints
- A suitable vendor will be identified to execute the project
- All applications included in the reduced sign-on/web portals solution will adhere to recognized industry standards (e.g. LDAP or SAML)
- Expired content and documents will not be moved and/or rewritten in the new website (some expired content may be flagged for migration)
- Orphaned documents will not be moved or rewritten
- 20% of the documents and images in the current content management system are orphaned and will not be discovered as part of the Content Inventory
- 40% of the documents in the current content management system are repeating reports, newsletters, formats, etc.
- Post content inventory and review, there will be approximately 1200 web pages and 4500 documents moved to the new website (based on the content inventory results)
- A two-week period of application stabilization is sufficient
- Implementation of the full project scope is possible within the given time and cost constraints
- A suitable vendor will be identified to execute the project
- All applications included in the reduced sign-on/web portals solution will adhere to recognized industry standards (e.g. LDAP or SAML)
- The existing GeoDocs site will be available to end users during a transitional period to be specified.

WORK APPROACH

PROJECT MANAGEMENT

The ODE Project Manager will monitor the project and provide vendor oversight. The ODE Project Manager will be the single point of contact between the vendor and ODE staff, both technical and business. Management of the project and vendor project team is the responsibility of the vendor.

The project will be managed using the Project Management Body of Knowledge (PMBOK) framework and methodologies. Adherence to PMBOK and PMCOP project management methodology is defined in the ODE PMO Guide and policy statements, the OIT PMCOP and includes, but is not limited to:

- Stakeholder management (project definition, governance, stakeholder buy-in)
- Estimating and planning (controlled estimation, planning, change control)
- Monitoring and reporting (progress metrics, reporting to business and technology stakeholders)
- Financial and business case control (budget management, financial control, benefit tracking)
- Supplier management (statement of work, task order, progress management)
- Risk and issue management (active management of risks, issues and mitigation)
- Configuration management (tight control of project deliverables)
- Quality management (devise and apply acceptance criteria, demonstrate compliance)
- Knowledge management (using existing knowledge base, project knowledge transfer)

The following project management artifacts are required:

- Project Schedule
- Meeting Minutes
- Weekly Status Reports
- Monthly Executive Status Reports
- Issues Log
- Risk Log
- Deliverables Acceptance
- Project Closeout Report

Major Activities/Phases

1. **Planning and Inception** – This phase includes the typical activities for any project startup, however it also includes a critical step for the ODE Website Redesign. This step is the content inventory. The content inventory is a primarily manual process that is necessary to truly understand the number of content items that will need to be migrated to the new website and migration path each item will follow. This output of the content inventory is critical to obtain a true estimate of the effort necessary to convert

In addition there are multiple project tracks that will be established during the Planning phase. The following is the list of tracks that will be followed throughout the project.

- Website Content Migration
- Content Management System (CMS) Configuration (CMS Software, Design & Workflow)
- CMS Architecture
- Website Policy Development
- Website Policy & Content Management Governance
- OCM Strategy (Change Management Communication and Training)
- CMS Tool, Workflow and Policy Training & Communication

2. **Design** – During the design phase, the implementation vendor will work closely with ODE to gather requirements for configuration of the content management system and low-level mapping of all content items to the proposed taxonomy. Website templates and workflows will be designed and tested for usability. Finally content management training and website policy communications will be developed.
3. **Build and Test** – This phase includes steps to implement the designated website templates and content management workflows. Testing of these items is once again focused on usability. It is also important that training begin to be delivered to users as more ODE employees will become users of CMS during the conversion phase and will need to have some background for use of the tool. Equally important will be the development of the website policy and governance process. ODE participants will need to be educated on the new policies and ready to adapt their content to meet the guidelines.
4. **Conversion** – The conversion phase of the project is where the bulk of the effort is. Conversion entails, moving, reformatting and in some cases rewriting content on the new website platform to meet website policies and communication guidelines. This phase of the project will require the most effort as well as the most input from ODE resources.
5. **Performance and User Acceptance Test (UAT)** – ODE Website users will participate in UAT to test all functions of the website to ensure that it performs as designed. The vendor test lead will assist in creation of UAT scripts which will be executed by the users. The vendor will be on hand to correct defects identified in testing. Upon acceptance of test results, the go/no-go decision will be made to move the new system to production. It is critical to get website user participation in the user acceptance testing process.
6. **Rollout and Stabilization** – Prior to system deployment, user communications will be provided to ODE Website users. Once the system is rolled out, the vendor project team will provide support as needed to assist users with problems encountered. Standard project closeout activities are also included in this phase, such as knowledge transfer.

Status Reporting

The vendor will provide weekly status reports and attend regular scheduled weekly status meetings. Detailed project tasks and work items will be stored in and reported through ODE Microsoft SharePoint site for this project.

Schedule

The vendor will develop the project schedule, to be reviewed and approved by the ODE project manager. It will be stored on the project’s SharePoint. They will be made available to the entire project team, ODE ITO management and business sponsors and users. The vendor will be responsible for meeting all timelines designated and agreed by ODE project manager and business sponsors.

Vendor Personnel

The vendor is responsible for replacing, in a timely manner, any personnel whose skills the ODE determines to be inadequate to perform the tasks required. The vendor must obtain equally-qualified replacement personnel for any personnel who become unavailable during the course of the project.

The vendor agrees that it is a separate and independent enterprise from the state and from the Department. This contract is not to be construed as creating any joint employment relationship

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| between the Contractor and the Department or the State of Ohio. |
| Participation in Meetings |
| The vendor will participate in meetings as necessary. The overall project and related activities will drive the need for meetings during various aspects of this implementation project. |
| Standards Compliance |
| <p>The Ohio Department of Education (ODE) requires the use of Microsoft Team Foundation Server (TFS) for all software development tasks, such as requirements, work items, and automated testing.</p> <p>ODE has developed the following standards documents, which vendors are required to adhere to over the course of the project:</p> <ul style="list-style-type: none">➤ ODE Database Standards➤ Application Development Standards➤ Web Standards➤ Testing Standards➤ Project Management Standards➤ Infrastructure Standards<ul style="list-style-type: none">○ Desktop○ Network○ Server (Application, Database, Web, OS)○ Storage <p>All vendor staff working on ODE projects are required to review the ODE Information Security policies and sign an ODE Information Security and Confidentiality Certification form when complete.</p> <p>In addition, the following documents—available from the ODE Project Manager—are part of ODE’s standards document library:</p> <ul style="list-style-type: none">➤ ODE .net Framework Assembly Documentation➤ BUILD Process Documentation➤ SAFE Documentation <p>To ensure compliance with ODE development standards, the vendor is required to participate in a regularly scheduled code review sessions with ODE System Architects. These sessions typically require one to two hours of the technical lead’s time per week.</p> |
| Microsoft Project |
| ODE requires the use of Microsoft Project with all projects. |
| Non-Disclosure Agreement |
| Both candidate and company will be required to sign non-disclosure agreements which prevent disclosure of any data obtained while on the engagement which can be used to personally identify any parties at anytime either during or after the engagement. |

| Training |
|---|
| <p>Training defines the activities for providing adequately trained personnel. As such, all new applications and any major enhancements to existing applications require training as a deliverable. Training is required for both the end user and system administrator. ODE strives to create user-friendly applications that require minimal training and offer an email help feature, but makes initial training one of the final deliverables prior to contract closeout. Informal training is also facilitated through user involvement in testing during Quality Assurance (QA), providing exposure to the application and a level of comfort prior to use in the production environment.</p> |

DELIVERABLES

| KEY PROJECT DELIVERABLES | | | |
|--|-----------------------|--|--------------------------|
| Technical Artifacts | | | |
| Key Deliverable | Responsibility | Acceptance Criteria | Approval Required |
| Project artifacts as defined in the Work Approach section of this document | Vendor | Approval from ODE Director of Project Management Office, and ODE Project Manager | Yes |
| Implementation of Web Redesign Solution | Vendor | Approval from ODE CIO, ODE Communications Office, ODE Director of Enterprise Applications, and ODE Project Manager | Yes |
| System Architecture Diagram/Models (Visio Diagrams) | Vendor | Approval from ODE ITO Enterprise Applications Director | Yes |
| Requirements and Requirements Traceability Matrix Report | Vendor | Approval from ODE Director of Project Management Office, and ODE Project Manager | Yes |
| Master Test Plan | Vendor | Approval from ODE CIO, ODE Communications Office, ODE Director of Enterprise Applications, and ODE Project Manager | Yes |
| Use Cases or Business Scenarios | Vendor | Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager | Yes |

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|------------------------------|--------|--|-----|
| High Level Design | Vendor | Approval from ODE CIO, ODE Communications Office, ODE Director of Enterprise Applications, and ODE Project Manager | Yes |
| Screen Design | Vendor | Approval from ODE CIO, ODE Communications Office, ODE Director of Enterprise Applications, and ODE Project Manager | Yes |
| Deployment Strategy and Plan | Vendor | Approval from ODE CIO, ODE Communications Office, ODE Director of Enterprise Applications, and ODE Project Manager | Yes |
| Web Application Code | Vendor | Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager | Yes |
| User Acceptance Testing | Vendor | Approval from ODE Communications & Outreach Executive Director | Yes |
| Release Readiness Review | Vendor | Approval from ODE Communications & Outreach Executive Director | Yes |

STAFFING

ODE assumes that the following staffing requirements would be required to execute the scope of the proposal. All resources will be required to complete their work on site at ODE (25 S. Front Street, Columbus, Ohio) but are not expected to remain at the location for the duration of the engagement. The vendor will determine the staffing level and appropriate onsite work schedule for each resource.

A resource may be assigned to more than one role; however, that resource must function in the role(s) to which he or she is assigned. More than one resource can be assigned to any of the listed roles, but at least one assigned resource must meet the listed *Skills Required* for that role. Any proposed candidate used to demonstrate that the vendor’s proposed team meets the staffing requirements for a particular position/role must perform that role on the project. For example, if a particular candidate, John Doe, is proposed to demonstrate meeting the skill requirements for the “Business Analyst” role, then John Doe must be used on the project to perform tasks and activities requiring “Business Analyst” skills. John Doe’s experience cannot be used to meet the “Business Analyst” skill requirements if the vendor has no intention of having John Doe perform a substantial portion of the tasks and activities requiring “Business Analyst” skills. If the vendor determines that a specified role is not necessary for the project’s success, the proposal must include a detailed justification for that decision.

The vendor proposal must show how each candidate meets the required/preferred skill set. Simply submitting a resume will not be sufficient.

| STAFFING REQUIREMENTS | | | |
|------------------------------|-------------------------|---|---|
| Resource | Type of Resource | Skills Required | Skills Preferred |
| Project Manager | Vendor | <ul style="list-style-type: none"> • PMP Certification • Minimum 10 years IT experience • Minimum 5 years experience in managing projects leveraging developers and consultants • Minimum 5 years experience in a fixed bid relationship • Minimum 5 years experience with direct responsibility / accountability to senior executives (examples include Industry VPs, Agency Directors, Military 0-6 and above) • Project management responsibility on a minimum of 2 projects that included data system consolidation | <ul style="list-style-type: none"> • Experience as a project manager on at least 1 project that included implementation of an identity management solution • Experience as a project manager in a state or federal environment (employee or consultant) • Experience as a project manager on at least 1 project involving state or national implementation of a technology solution • Prior experience with Kentico CMS • Experience with Microsoft Team Foundation Server • Experience with Microsoft SharePoint • Bachelor's Degree in Information Technology, Business, or appropriate field of study |

| STAFFING REQUIREMENTS | | | |
|------------------------------|-------------------------|---|---|
| Resource | Type of Resource | Skills Required | Skills Preferred |
| Business Analyst 1 | Vendor | <ul style="list-style-type: none"> • Minimum 8 years overall IT experience. • Minimum 5 years experience in business and requirements analysis • Minimum 5 years experience writing use cases and/or storyboarding • Business analyst responsibility on a minimum of 2 projects that included data system consolidation | <ul style="list-style-type: none"> • Experience in conducting JAD sessions • Experience in developing and editing project and technical documentation • Prior experience with Kentico CMS • Experience with a requirement management tool • Experience with Team Foundation Server • BS or MS in related field • Relevant certifications |
| Business Analyst 2 | Vendor | <ul style="list-style-type: none"> • Minimum 8 years overall IT experience. • Minimum five years' experience in business and requirements analysis • Minimum two years' experience writing use cases and/or storyboarding | <ul style="list-style-type: none"> • Experience in conducting JAD sessions • Experience in developing and editing project and technical documentation • Prior experience with Kentico CMS • Experience with a requirement management tool • Experience with Team Foundation Server • BS or MS in related field • Relevant certifications |

| STAFFING REQUIREMENTS | | | |
|------------------------------|-------------------------|---|---|
| Resource | Type of Resource | Skills Required | Skills Preferred |
| Functional Lead/BA | Vendor | <ul style="list-style-type: none"> • Minimum eight years overall IT experience • Minimum five years' experience in business and requirements analysis • Minimum two years' experience writing use cases and/or storyboarding • Minimum five years Functional Lead/BA experience | <ul style="list-style-type: none"> • Experience in conducting JAD sessions • Experience in developing and editing project and technical documentation • Prior experience with Kentico CMS • Experience with a requirement management tool • Experience with Team Foundation Server • BS or MS in related field • Relevant certifications |
| CMS Technical Lead | Vendor | <ul style="list-style-type: none"> • Minimum eight years overall IT experience • Minimum five years' experience in content management systems • Technical Lead responsibility on at least one prior Kentico CMS project • Technical Lead responsibility on a minimum of 2 projects of similar size and nature | <ul style="list-style-type: none"> • Experience in developing and editing project and technical documentation • 1-2 years Kentico CMS experience • Experience with Team Foundation Server • BS or MS in related field • Relevant certifications |

| STAFFING REQUIREMENTS | | | |
|------------------------------|-------------------------|---|--|
| Resource | Type of Resource | Skills Required | Skills Preferred |
| Web Designer/Developer | Vendor | <ul style="list-style-type: none"> • Minimum eight years overall IT experience. • Minimum three years experience in designing and developing website solutions • Minimum one year .net/C# development experience • Experience in XML, HTML, CSS, Javascript, SQL • Development responsibilities on at least one prior Kentico CMS project • Web Designer / Developer responsibility on a minimum of 2 projects of similar size and nature | <ul style="list-style-type: none"> • Experience in developing and editing project and technical documentation • Prior experience with Kentico CMS • Experience in XML, HTML, CSS, Javascript, SQL • Experience with Team Foundation Server • BS or MS in related field • Relevant certifications |
| OCM Analyst | Vendor | <ul style="list-style-type: none"> • Minimum eight years overall IT experience. • Prior responsibility on a minimum of 2 projects of similar size and nature • Experience in developing actionable and targeted change management plans, including communication plan, sponsor roadmap, coaching plan, training plan and resistance management plan. | <ul style="list-style-type: none"> • Experience with Team Foundation Server • Prior experience with Kentico CMS • BS or MS in related field • Relevant certifications |

ROLES AND RESPONSIBILITIES

| FUNCTIONAL AREA | REQUIRED ROLE | RESPONSIBILITIES | STAFF |
|---------------------------------|-------------------------------|---|---|
| ODE Communications and Outreach | Executive Sponsor | Represents business interests of the project. Fulfills the following responsibilities: <ul style="list-style-type: none"> • Provides management commitment to the project • Provides guidance on policy decisions, and project strategic and tactical decision-making • Reviews and signs off on project deliverables | Executive Director, ODE Communications and Outreach |
| ODE Communications and Outreach | Site Manager | Represents business interests of the project. Fulfills the following responsibilities: <ul style="list-style-type: none"> • Implements daily activities on the project • Implements policy decisions • Conduit for Communications and Outreach project strategic and tactical decision-making • Reviews and signs off on project deliverables • Provide data and informational reports | Assistant Executive Director, ODE Communications and Outreach |
| Business Center | Subject Matter Experts (SMEs) | Represent the end-user interests of the project. Fulfill the following responsibilities: <ul style="list-style-type: none"> • Provide output requirements (data and design) • Provide design recommendations for data input • Provide insight on usability | ODE/Participating Entities |

| FUNCTIONAL AREA | REQUIRED ROLE | RESPONSIBILITIES | STAFF |
|---|--------------------|---|---|
| Information Technology Office | Technology Sponsor | <p>Represents technology interests of the project. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> • Provides guidance for technological issues • Provides guidance on policy issues • Makes decisions on issues escalated by the Applications Development Manager • Ensures that required ODE technical resources are available | ODE Director of Enterprise Applications |
| PMO | Project Manager | <p>Represents ODE Project Management Office interests of the project. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> • Creates the SOW • Selects the contractor • Develops the high level project schedule • Approves vendor invoices • Manages scope change and control • Reports progress and escalates problems as needed to Project Executive Sponsors • Reviews project deliverables • Provides project oversight • Interfaces with vendor representatives | ODE (Assigned Project Manager) |
| Enterprise Applications / Application Development | | <p>Represents ODE Enterprise Applications' interests of the project. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> • Installs recommended software • Ensures compliance with ODE applications development standards • Reviews and approves testing and technical deliverables • Attends all status meetings during which technological issues will be discussed. | ODE Enterprise Applications Director |

MANAGEMENT APPROACH

DELIVERABLE ACCEPTANCE MANAGEMENT

Project key deliverables and products will be approved by staff assigned in the Deliverables Section. All approved deliverables require a hand written signature of appropriate staff member. A Deliverables Log must be attached to the regular project status report. A deliverable log will be submitted to the ODE Project Manager upon completion of each iteration of the project. This log will allow payment towards the payment schedule for the project. Payment will be based on acceptance of each deliverable.

RISK MANAGEMENT

Risk is anything that may have a negative impact on the project: schedule delay, increased costs, or poor quality of deliverables.

An initial risk assessment must be performed and an initial Risk Management Plan must accompany the response to this SOW. In the Risk Management Plan, include any identified risks, their potential impact, and a mitigation plan.

The Vendor Project Manager or Business Analyst will develop the Risk Management Plan, identify risks throughout the project and include as part of regular project status reports.

All risks need to be documented on ODE Project Server. The risk report will be included as part of regular project status reports.

ISSUES AND PROBLEM MANAGEMENT

The project will capture, prioritize, resolve, escalate, and monitor reported issues and problems. The Issues Log will be leveraged for weekly communication meetings.

PROGRESS REPORTING AND COMMUNICATIONS

| PROJECT STATUS REPORTS | | |
|---------------------------------------|---|---|
| Type of Status Report | Due | Purpose |
| Weekly Team Member Status Report | Attached to every vendor status report for the appropriate time period | Created by the vendor to enable the ODE Project Manager to monitor and control the progress of individual project team members and update the Project Plan. |
| Weekly Project Status Report | Weekly | Created by the vendor to enable the ODE Project Manager to monitor and control the progress of the project and update the Project Plan. |
| Monthly Status Report | Monthly | Created by the ODE Project Manager to communicate project progress to the project sponsor. |
| OTHER COMMUNICATION STRATEGIES | | |
| Communication Strategy | Purpose | |
| PMO Sharepoint Site | <ul style="list-style-type: none"> Track risks and issues Store and share working documents Store final documents and deliverables | |

BUDGET

| BUDGET |
|---|
| Vendor Payment Process |
| This is a fixed bid proposal that will follow the Vendor/State STS Agreement. |
| Terms and Conditions |
| Vendor/State STS Agreement |
| Termination Provisions |
| Vendor/State STS Agreement |

POST-PRODUCTION SUPPORT

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| POST-PRODUCTION SUPPORT |
| Defects and Response Time |
| <p>The vendor will correct defects on the developed components during implementation and for six months from the date final acceptance is received.</p> <p>Acknowledgement of a potential defect item will be returned via email within 24 hours. Issue resolution should begin within 48 hours and continue on site until resolved.</p> |
| Support |
| <p>Post production vendor provided application support and maintenance through the end of the State fiscal year (June 30, 2013) is included in this Statement of Work. The support and maintenance will be renewable on an annual basis.</p> |

VENDOR PROPOSAL

| |
|--|
| Vendor Proposal Requirements |
| <p>Submitting vendors will provide a Vendor Proposal on company letterhead that includes the total contract cost, company qualifications, resource resumes and your company's development and project management approach. The proposal should demonstrate your understanding of the project. The quote must also include your STS number.</p> <p>Prospective vendors will be required to: A) read and understand Executive Order 2011-12K, B) complete the Standard Affirmation and Disclosure Form related to the Executive Order, and C) sign the Standard Terms and Conditions related to the Executive Order.</p> <p>Note - During the performance of this contract, the vendor shall not change the location(s) of the country where services are performed, or change the location(s) of the country where the data are maintained or made available without prior written approval of the Department, if applicable.</p> <p>Send your proposal offering via email (jim.weber@education.ohio.gov) with a copy to the ODE Agency Procurement Officer (amadu.sankoh@education.ohio.gov) by 5:00 PM on 8/10/2012.</p> <p>Note - All information contained in a vendor proposal is considered public information unless disclosure is prohibited by state or federal law.</p> |

STANDARD AFFIRMATION AND DISCLOSURE FORM

EXECUTIVE ORDER 2011-12K

Governing the Expenditure of Public Funds on Offshore Services

All of the following provisions must be included in all invitations to bid, requests for proposals, state term schedules, multiple award contracts, requests for quotations, informal quotations, and statements of work. This information is to be submitted as part of the response to any of the procurement methods listed.

By the signature affixed hereto, the Contractor affirms, understands and will abide by the requirements of Executive Order 2011-12K. If awarded a contract, both the Contractor and any of its subcontractors shall perform no services requested under this Contract outside of the United States.

The Contractor shall provide all the name(s) and location(s) where services under this Contract will be performed in the spaces provided below or by attachment. Failure to provide this information may subject the Contractor to sanctions. If the Contractor will not be using subcontractors, indicate "Not Applicable" in the appropriate spaces.

1. Principal location of business of Contractor:

(Address)

(City, State, Zip)

Name/Principal location of business of subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

2. Location where services will be performed by Contractor:

(Address)

(City, State, Zip)

Name/Location where services will be performed by subcontractor(s):

(Name) (Address, City, State, Zip)

(Name) (Address, City, State, Zip)

3. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor:

(Address) (Address, City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained or backed-up by subcontractor(s):

(Name) (Address, City, State, Zip)

Contractor also affirms, understands and agrees that Contractor and its subcontractors are under a duty to disclose to the State any change or shift in location of services performed by Contractor or its subcontractors before, during and after execution of any Contract with the State. Contractor agrees it shall so notify the State immediately of any such change or shift in location of its services. The State has the right to immediately terminate the contract, unless a duly signed

waiver from the State has been attained by the Contractor to perform the services outside the United States.

On behalf of the Contractor, I acknowledge that I am duly authorized to execute this Affirmation and Disclosure form and have read and understand that this form is a part of any Contract that Contractor may enter into with the State and is incorporated therein.

By: _____

Contractor

Print Name: _____

Title: _____

Date: _____

STANDARD TERMS AND CONDITIONS

EXECUTIVE ORDER 2011-12K

Governing the Expenditure of Public Funds on Offshore Services

The Contractor affirms to have read and understands Executive Order 2011-12K and shall abide by those requirements in the performance of this Contract. Notwithstanding any other terms of this Contract, the State reserves the right to recover any funds paid for services the Contractor performs outside of the United States for which it did not receive a waiver. The State does not waive any other rights and remedies provided the State in this Contract.