



## **Interface Project Lead**

**R E Q U E S T F O R Q U O T A T I O N**

**State Term Schedule**

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## **INTRODUCTION AND BACKGROUND**

### **PURPOSE OF THE REQUEST FOR QUOTATION**

Please consider this as the State of Ohio, Department of Administration, Office of Information Technology's (OIT) Request for Quotation for the following consulting position:

#### **Interface Project Lead**

The State of Ohio, is requesting one resume per vendor and quotation for an Interface Project Lead. The role is needed from **June 3, 2013 until June 30, 2013**.

### **BACKGROUND**

The Interface lead is responsible for leading the design and execution of the interfaces required by the Enterprise project. This role will also lead creation of the requirements, principles, designs and models that strengthen the network effect of sharing such information across the enterprise.

#### **Scope of Activities:**

- Develop and manage master Interface project plan, scheduling, dependencies, risks, contingency plans and allocation of available resources
- Ensure that the various interface tasks are coordinated, stay on track, and articulate and frame matters requiring escalation to enable quick and efficient decision-making for governing body
- Develop and implement a simple, but multi-tiered decision making and issue resolution matrix
- Prepare integrated interface project status reports, and keep governing body and stakeholders informed of project status and related issues
- Frame, communicate and resolve project risks and issues
- Promote and support principles for designing uniform and consistent identifiers, formats and protocols necessary and standards available for improving semantic consistency and sharing enterprise information
- Review requirements, design and oversee execution of the detailed approach to interfaces that includes prerequisites, sequence of steps, pilot activities, and checkpoints passed to achieve full integration. This includes the classification of pilot, phased, and cut-over approaches to system(s) conversion(s) whether it is a parallel, immediate cut-over or phased conversion
- Ensure that automated tools are leveraged as part of the interface development approach to reduce the amount of manual effort by the end user

- Manage and participates in interface development team efforts
- Work with end user IT staff to coordinate access to local systems if/when needed
- Work with system integrator counterpart to coordinate the pilot and production systems and assists the testing team with validation of system integration efforts.
- Work with State Staff to validate data mapping exercises
- Coordinate interface discovery and design sessions
- Coordinate unit, integration, system, and user acceptance testing activities for interfaces
- Perform quality reviews of Functional and Technical interface development specifications to ensure they are designed to meet the overall business requirements and sustainability
- Work with system integrator and interfacing systems points of contact to ensure alignment of design, development, testing and implementation schedules of interfaces
- Perform quality reviews of all unit, integration, system, and user acceptance testing of interfaces as required
- Support quality reviews with IV&V and other external testing entities (as defined by the project team) for all interface design, development, testing and implementation efforts
- Ensure that the system integrator catalogs the inventory of interfaces and ensure proper documentation (e.g., MOAs, SLAs, etc.) with the interfacing systems Ensure the system integrator adheres to the interface specifications such as programming standards, naming conventions, and policies as defined by the State

**Skills and Credentials:**

- Understanding of policy and functions within state and local government health and human services
- In-depth experience in implementing information solutions
- Candidate should have a combination of strong communication/facilitation skills with conceptualization/design skills
- Strong applied knowledge of software interfacing development efforts through implementation including good design, documentation and supportability practices
- Knowledge of:
  - Business requirements analysis;
  - Interface design methodology;
  - Interface testing strategies and procedures; and

- Interface service establishment including Memorandums of Agreement and Service Level Agreements
- Five years' experience managing multiple complex projects in a federated environment with:
  - Demonstrated leadership of multidiscipline, high-performance work teams/groups; and
  - Demonstrated high competency in execution of multiple large projects
- Experience working in a program management office (PMO) using project and portfolio management tools
- Candidate should have a minimum of five years of experience in IT, with at least three years in information system design

**Other Requirements of the Position:**

- Bachelor's degree in computer science, management information systems, or related field
- Knowledge of software implementation methodologies such as SDLC, Agile, etc.
- General knowledge of application architecture and data modeling
- Knowledge of interfacing with various applications, management information systems, data structures, systems analysis and design, and programming languages
- Ability to design, implement and modify systems
- Ability to work effectively in a multi-disciplinary team
- Strong organizational skills
- Verbal and written communication skills
- Interpersonal/human relations skills
- Ability to maintain confidentiality
- MBE or EDGE preferred, but not required;

**ADMINISTRATIVE**

**DUE DATES**

All quotations are due by 8:00 am, EST, on Tuesday, May 28, 2013. Any quotation received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late quotations will not be evaluated for award.

## SCHEDULE OF EVENTS

All times are Eastern Standard Time (EST).

Event	Date
1. RFQ Distribution to Vendors	May 16, 2013
2. Proposal/Quotation Due Date	8:00 a.m., May 28, 2013
3. Target Date for Review of Proposal/Quotation	May 28, 2013
4. Anticipated decision and selection of Vendor	May 29, 2013
5. Anticipated commencement date of work	June 3, 2013

## EVALUATION FACTORS FOR AWARD

### EVALUATION

The following will be considered in determining the vendor to be selected for this engagement, according to a standardized scoring methodology:

- Relevant experience
  - Relevant skill level
  - Proposed contractor rate(s)
- The contractor will not be permitted to substitute personnel for those submitted for RFQ evaluation (during the RFQ evaluation or at project start-up), except when a candidate's unavailability is no fault of the contractor (e.g., Candidate is no longer employed by the Contractor, is deceased, etc.). Note: If a substitution situation occurs, the proposal will be re-evaluated. If the substitution gives the contractor an unfair advantage during the RFQ process, the proposal may be eliminated or the other vendors will also be given the chance to submit substitutions of personnel also.
  - All proposals will be evaluated for meeting the requested information. Incomplete proposals will not be reviewed. The proposals that provided the requested information will be evaluated for at least the highest prioritized candidate. The proposals will be scored based on the criteria requested above. We reserve the option to interview the top candidates. Candidate substitutions between the proposal evaluation and interview periods are highly discouraged (see above). If OIT has other qualified candidates, the contractor's proposal requesting a substitution will be denied at this stage and the proposal will be eliminated from evaluation. If OIT does not have enough qualified candidates due to the substitution, all received proposals will be asked to confirm their candidates, given a couple of days to provide replacements, and the entire process will start over.

### TERM AND CONTRACT

- The contract will be for **Time and Material** through State Term Schedule (STS) contract and must reflect or be lower than STS rates, and must use STS categories.
- The term will be until June 30, 2013.
- No additional costs, such as travel, meals, lodging, taxes, parking or other associated costs may be charged separately for this work. The vendor's sole compensation for the duties described herein shall be the billings at the vendor's hourly rate.
- All contractors shall read, acknowledge and follow DAS policies, rules and guidelines.
- All work performed by the vendor shall be deemed a "work-for-hire," and shall be the sole property of the State of Ohio. The vendor may not use such work without OIT's written consent.
- Contractors shall use state provided equipment, any exceptions shall be approved by the OIT Administrator.

- The contractor, as a component of the project kick-off meeting, will be required to sign any state policy documents that are deemed appropriate by the OIT Division.

## STATUS REPORTING

The contractor will provide weekly status reports to the State. The contractor will be responsible for meeting all timelines designated by assigned Project Manager. Weekly timesheets will be reviewed and signed by the OIT Project Manager. Invoices must be accompanied by timesheets and submitted monthly for payment.

## NON-DISCLOSURE AGREEMENT

Both candidate and company will be required to sign a non-disclosure agreement which prevents disclosure of any data obtained while on the engagement which can be used to personally identify any parties at any time either during or after the engagement.

## GUIDELINES FOR QUOTATION PREPARATION

### QUOTATION SUBMITTAL

Each Vendor must submit three (3) complete, sealed and signed copies of its quotation (excluding cost information), and each quotation must be clearly marked “Interface Project Lead” on the outside of its envelope along with Vendors name.

**The cost information MUST be signed, and submitted in a SEPARATELY SEALED ENVELOPE.**

The envelope must be clearly marked “Interface Project Lead” on the outside of its envelope along with the Vendor’s name.

A single electronic copy of the complete quotation must also be submitted with the printed quotations. Electronic submissions should be on a CD, DVD or USB memory stick. **The electronic copy MUST be submitted in a SEPARATELY SEALED ENVELOPE.**

Each proposal must be organized in the same format as described below. Any material deviation from the format outlined below may result in a rejection of the non-conforming proposal. Each proposal must contain an identifiable tab sheet preceding each section of the proposal. Quote should be good for a minimum of 45 days.

- Cover Letter (include email address)
- MBE or EDGE Certification – if applicable
- State Term Schedule Number
- STS Labor Category Code
- Candidate Information [ 1 ] per Vendor:
  - Position References (3 minimum) - form

- Candidate Resume [ 1 per vendor]
- Additional candidate Information (optional) – vendor form
- Candidate Hourly Rate
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form

The State will not be liable for any costs incurred by any offeror in responding to this RFQ, even if the State does not award a contract through this process. The State may decide not to award a contract at the State's discretion. The State may reject late quotations regardless of the cause for the delay. The State may also reject any quotation that it believes is not in its interest to accept and may decide not to do business with any of the Vendors responding to this RFQ.

Quotations MUST be submitted to the State's Procurement Representative:

**Ms. Nychola Richardson, MAS1**  
**30 East Broad Street, 39<sup>th</sup> Floor**  
**Columbus, OH 43215**

#### **PROPRIETARY INFORMATION**

All quotations and other material submitted will become the property of the State and may be returned only at the State's option. Proprietary information should not be included in a quotation or supporting materials because the State will have the right to use any materials or ideas submitted in any quotation without compensation to the Vendor. Additionally, all quotations will be open to the public after the contract has been awarded.

The State may reject any Proposal if the Vendor takes exception to the terms and conditions of this RFQ.

#### **WAIVER OF DEFECTS**

The State has the right to waive any defects in any quotation or in the submission process followed by a Vendor. But the State will only do so if it believes that is in the State's interest and will not cause any material unfairness to other Vendors.

#### **REJECTION OF QUOTATIONS**

The State may reject any quotation that is not in the required format, does not address all the requirements of this RFQ, or that the State believes is excessive in price or otherwise not in its interest to consider or to accept. The State will reject any Non-STS responses. In addition, the State may cancel this RFQ, reject all the quotations, and seek to do the work through a new RFQ or other means.

## **EVALUATION OF QUOTATIONS**

### **Clarifications and Corrections**

During the evaluation process, the State may request clarifications from any Vendor under active consideration. It also may give any Vendor the opportunity to correct defects in its quotation. But the State will allow corrections only if they do not result in an unfair advantage for the Vendor and it is in the State's best interest.

### **Requirements**

This RFQ asks for responses and submissions from Vendors. While each criterion represents only a part of the total basis for a decision to award the contract to a Vendor, a failure by a Vendor to make a required submission or meet a requirement will normally result in a rejection of that Vendor's quotation. The value assigned to each criterion is only a value used to determine which quotation is the most advantageous to the State in relation to the other quotations that the State received. It is not a basis for determining the importance of meeting any requirement to participate in the quotation process.

The evaluation process **may** consist of up to three distinct phases:

1. The procurement representative's initial review of all quotations for defects;
2. The evaluation committee's evaluation of the quotations; and
3. Interviews (optional).

### **Initial Review**

The procurement representative normally will reject any incomplete or incorrectly formatted quotation, though the procurement representative may elect to waive any defects or allow a Vendor to submit a correction. If a late quotation is rejected, the procurement representative will not open or evaluate the late quotations. The procurement representative will forward all timely, complete, and properly formatted quotations to an evaluation committee, which the procurement representative will chair.

### **Committee Review of the Quotations**

The State's review committee will evaluate and numerically score each quotation that the procurement representative has forwarded to it.

The evaluation will result in a point total being calculated for each quotation. Those Vendors submitting the highest-rated quotations may be scheduled for the next phase. The number of quotations forwarded to the next phase will be within the committee's discretion, but regardless of the number of quotations selected for the next phase, they will always be the highest rated quotations from this phase.

At any time during this phase, the State may ask a Vendor to correct, revise, or clarify any portions of its quotation.

The State will document all major decisions in writing and make these a part of the file along with the evaluation results for each quotation considered.

Once the technical merits of a quotation are considered, the costs of that quotation will be considered. But the State may also consider costs before evaluating the technical merits of the quotations by doing an initial review of costs to determine if any quotations should be rejected because of excessive cost. And the State may reconsider the excessiveness of any quotation's cost at any time in the evaluation process.

### **Interviews**

The State may record any presentations, demonstrations and interviews.

### **Determination of Responsibility**

The State may review the highest-ranking Vendors or its key team members to ensure that the Vendor is responsible. The Contract may not be awarded to a Vendor that is determined to be not responsible. The State's determination of a Vendor's responsibility may include the following factors: the Vendor's and its key team members' experience, past conduct on previous Contracts, past performance on previous Contracts, ability to execute this contract properly and management skill. The State will make such determination of responsibility based on the Vendor's quotation, reference evaluations and any other information the State requests or determines to be relevant.

### **Changing Candidates**

The major criterion on which the State bases the award of the contract is the quality of the Vendor's candidate(s). Changing personnel after the award may be a basis for termination of the contract.

### **Contract Award Process**

It is OIT's intention to award one contract under the scope of this RFQ and as based on the RFQ Calendar of Events schedule, so long as OIT determines that doing so is in the State's best interests and OIT has not otherwise changed the award date. Any award decision by OIT under this RFQ is final. After OIT makes its decision under this RFQ, all Proposers will be notified in writing of the final evaluation and determination as to their proposals.

OIT anticipates making one award depending on program needs and the fit of the Proposer to the scope of this RFQ.

**ATTACHMENT ONE**  
**PERSONNEL PROFILE SUMMARY**  
**CANDIDATE REFERENCES**

**Candidate's Name:**

**References**

Provide three references for which the proposed candidate has successfully demonstrated meeting the requirements of the RFQ on projects of similar size and scope in the past five years. The name of the person to be contacted, phone number, company, address, brief description of project size and complexity, and date (month and year) of employment must be given for each reference. These references must be able to attest to the candidate's specific qualifications.

The reference given should be a person within the client's organization and not a co-worker or a contact within the offerors organization.

If less than three references are provided, the offeror must explain the reason for the shortage. The State may disqualify the Proposal if fewer than three references are given.

<b>Client Company:</b>	<b>Client Contact Name:</b>	<b>Client Contact Title:</b>	
<b>Client Address:</b>		<b>Client Contact Phone Number:</b>	
<b>Project Name:</b>	Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year	
<b>Description of services provided that are in line with those to be provided as part of this Project:</b>			
<b>Description of how client project size and complexity are similar to this project:</b>			

**ATTACHMENT ONE**  
**PERSONNEL PROFILE SUMMARY**  
**CANDIDATE REFERENCES CONTINUED**

<b>Client Company:</b>	<b>Client Contact Name:</b>	<b>Client Contact Title:</b>	
<b>Client Address:</b>		<b>Client Contact Phone Number:</b>	
<b>Project Name:</b>		Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year
<p><b>Description of services provided that are in line with those to be provided as part of this Project:</b></p> <p><b>Description of how client project size and complexity are similar to this project:</b></p>			

