Department of Administrative Services, Office of Work Force Transformation:

Office of Work Force Transformation – Digital Resource Finder Tool

InnovateOhio Platform Statement of Work Solicitation DXDAS-21-01-001

This opportunity is being released to InnovateOhio Platform (IOP) Contractors (formerly Ohio Digital Experience (ODX)) prequalified as a result of RFP #0A1216. This Project Statement of Work (SOW) is issued under, incorporated into and governed by Contract #0A1216. Contractor agrees that it is in compliance with Contract #0A1216 and must comply with this SOW.

ONLY prequalified Contractors are eligible to submit proposal responses AND to submit inquiries. The State does not intend to respond to inquiries or to accept Proposals submitted by organizations that are not prequalified.

An alphabetical listing of Contractors prequalified to participate in this opportunity follows:

Base22 Technology Group	**Deloitte Consulting**	**g2o (formerly ICC)**

Timeline:

SOW solicitation released to prequalified Contractors	**02/24/2021**
Inquiry period begins	**02/24/2021**
Pre-bid Conference at 1:00 p.m. EST	**02/26/2021**
Inquiry period ends at 8:00 a.m. EST	**03/05/2021**
Proposal response due date by 1:00 p.m. EST	**03/10/2021**

Statement of Work Solicitation

Contents

Section 1: Purpose

The purpose of this project Statement of Work (SOW) is to provide the Office of Work Force Transformation, herein after referred to as the "Agency", with information technology services related to onboarding to the State of Ohio InnovateOhio Platform (IOP) environment.

A qualified Contractor, herein after referred to as the "Contractor", must furnish the necessary personnel, equipment, materials and/or services and otherwise do all things necessary for or incidental to the performance of work set forth in Section 3: Scope of Work.

This SOW is issued under, incorporated into, and governed by contract #0A1216. The Contractor agrees that it is in compliance with contract #0A1216 and must comply with this SOW.

Section 2: Background Information

2.1 Agency Information

2.1.1 Agency or Program Name

Name: Office of Work Force Transformation

2.1.2 Contact Information

Name: Henry Harned

Email: hank.harned@owt.ohio.gov

2.2 Project Information

2.2.1 Project Name

Digital Resource Finder Tool

2.2.2 Project Background & Objectives

The Agency is seeking to secure a website development contractor to create the Digital Resource Finder website.

The selected Contractor will be responsible for:

- Using research, design, and an understanding of content to validate solutions that satisfy end users' needs
- Designing a user-centered, intuitive, and engaging website based on IOP Experience Principles
- Supporting the agency in the development of user-focused content strategies
- Defining and standing up the new website framework

- Providing training and resources to instruct Agency staff about the new foundation of digital capabilities and how to update those capabilities and their functions
- Executing organizational change management activities

The selected Contractor will utilize IOP User Experience Principles, including Content-First methodology, and IOP products and tools for this project.

In performing these tasks, which are further explained in the SOW and deliverables, the Contractor must work with the Agency and the Ohio Department of Administrative Services (DAS) IOP staff to ensure the new website is consistent with the InnovateOhio Platform and guidelines.

2.2.3 Expected Project Duration

This project build must be completed by 05/31/2021 or before. If a prospective Contractor cannot meet this timeline or any of the dates outlined in the project schedule, they may not be selected for this project.

2.3 Project Schedule

[Project Schedule Table Exhibit]

Milestone	Date
Earliest project commencement date	04/05/2021
Project kickoff with the Agency and IOP. The kickoff meeting will be held at the Agency where project team will confirm scope, requirements, project plan and timeline, meet Agency stakeholders, and conduct other Q&A as needed such that all parties are in alignment and stakeholders are identified.	Contractor proposed
Requirements gathering workshops	Contractor proposed
Contractor completes designs and demonstrates prototypes to the Agency	Contractor proposed
Content Management Training	Contractor proposed
System Test Completion	Contractor proposed
UAT Test Completion	Contractor proposed
Onboarding Complete	TBD by Agency and Contractor
Final site presentation	05/31/2021
Staff Training & Final Report	06/15/2021

2.4 Contractor's Work Effort Requirement

The Contractor's full-time regular employees must perform 80% of the effort required to complete the work.

Section 3: Scope of Work

3.1 Scope Description

The Contractor must bring all appropriate resources to execute the minimum scope below and propose any additional efforts they believe are required for this development and deployment effort.

BroadbandOhio, InnovateOhio, and the Office of Workforce Transformation seek to develop a website that will allow Ohioans to:

- Search by zip code/current location to locate digital access and literacy resources in their area.
    a. Digital access is defined as the ability to connect to the internet
    b. Digital literacy is defined as knowing how to use the internet
- Search by zip code/current location to find an organization that accepts device donations.

The website will follow IOP's user-centered content-first methodology to create a user-friendly digital framework, supporting users to find the information they need and easily complete tasks and interactions.

Primary audiences for this tool:

- Individual Ohioans with access to a computer or mobile phone, seeking more information about affordable internet, devices, and other broadband resources in their area on for themselves or on behalf of another (e.g. Ohioan seeking low-cost laptop, accessing the tool from a mobile device).
- People who serve Ohioans (e.g. case managers, library staff, etc.) with limited or no access to services, seeking information on behalf of a client.
- Ohioans who have digital devices to donate.

3.2 Requirements

3.2.1 ***Agency Requirements***

Websites in Scope

1. Digital Resource Finder website

Project Management

1. In addition to project status reporting in Atlas, a weekly status report PDF must be sent to the Agency Project Manager.

Discovery & Design

1. Digital framework/information architecture must focus on user needs and actions.

2. UX strategy and design must include user and stakeholder research findings, comparative analysis findings, persona creation, usability testing, and user journey maps highlighting moments of truth.
3. Digital marketing assets, including branded email templates and a social media ad campaign.

Organizational Change Management & Training

1. Train for geolocation enabled content.

Development

1. Creation of the Digital Resource Finder website.
    a. The Digital Finder tool must have the following capabilities:
        i. Search by location (e.g. zip code) including ability to search by current location (if location is enabled on the device)
        ii. Map view including ability to search nearby and view results on map
        iii. Search must filter and sort by the following parameters (in order of priority):
            1. Digital Resources:
                a. Low-cost internet service/deals offered in user's area
                b. Low-cost or subsidized devices
                c. Rentable/loaner hotspots
                d. Free public devices (e.g. computers at libraries)
                e. Rentable/loaner devices
            2. Digital Literacy
                a. Digital literacy training options
                b. Technical assistance for using devices and software through libraries/call centers
                c. Resources to help get a small business online
        iv. For each search result, the user must be able to view:
            1. Name of resource
            2. Brief 1-2 sentence description
            3. Link to website
            4. Address of the physical location (if applicable)
            5. Resource contact information
                a. Name (if applicable)
                b. Phone
                c. Email
    b. The Donation Search tool must have the following capabilities:
        i. Search by location (e.g. zip code) including ability to search by current location (if location is enabled on the device)
        ii. Map view including ability to search nearby and view results on map

        iii. Search must filter and sort by the following parameters (in order of priority):
            1. Laptops and desktops
            2. Mobile devices
            3. Networking devices
        iv. For each search result, the user must be able to view:
            1. Name of resource
            2. Brief 1-2 sentence description
            3. Link to website
            4. Address of the physical location
            5. Resource contact information
                a. Name (if applicable)
                b. Phone
                c. Email
2. Creation of a data collection and admin intranet (linked from main site) where businesses and organizations can request inclusion to the Finder or Donation tools and OWT/BroadbandOhio staff can administrate requests.
    a. Intranet must utilize out-of-the-box authenticated portal utilizing Core templates
    b. Requester Dashboard
        i. Digital Resource Finder request form must allow users to submit new requests and edit or delete current requests. Workflow must be enabled to route new and edited requests for approval before publication. Form fields must include:
            1. Name of resource
            2. Offer start date
            3. Offer expiration date
            4. Brief 1-2 sentence description
            5. Link to website
            6. Address of the physical location (if applicable)
            7. Requester OHID
        ii. Donation search request form must allow users to submit new requests and edit or delete current requests. Workflow must be enabled to route new and edited requests for approval before publication. Form fields must include:
            1. Name of resource
            2. Brief 1-2 sentence description
            3. Link to website
            4. Address of the physical location
            5. Resource contact information
                a. Name (if applicable)
                b. Phone
                c. Email

        6. Requester OHID
    c. Approval Dashboard
        i. Administrators must be able to:
            1. Add, edit, and delete/disable resources
            2. View, approve and deny requests
            3. Generate email communication and flag on Requestor Dashboard confirming publication status and if request is denied, allow for custom comments

3.2.2 ***IOP Requirements***

All work must be customer-focused and data-driven in alignment with InnovateOhio and InnovateOhio Platform.

Project Management

A. Project status reporting must take place via the IOP ATLAS (Atlassian) toolset.
B. Project Management will include a traceability matrix for all deliverables.
C. Research and best practices must be applied and documented as inputs to be used by Agency stakeholders for all project decisions and site mission support.

Discovery & Design

D. On-site Contractor moderated meetings and information gathering sessions will be conducted to document or create the following:
    a. Mission(s) and goal(s).
    b. Content strategy, including mapping and rationalizing current content and creating future content roadmaps.
    c. UX strategy and design.
    d. Creating and validating the website framework and information architecture.
E. Creating clickable prototypes for desktop, tablet, and mobile to document the general vision and tone of the new website. The prototype must include the site homepage and four additional pages at minimum, as long as major components and pathways are presented for decision-making purposes.
F. All design must meet all IOP and other State policies such as accessibility and mobile-first design and be compliant with the IOP Digital Toolkit and Design System.
G. Any new design patterns must be submitted for design review and inclusion in the IOP Design System. Only approved patterns and code can be deployed in the live environment.
H. Content must follow IOP's user-centered *content-first* methodology and be compliant with IOP's Content Style Guide.

Development

I. Sites and applications built in this scope must be responsive to support all screen resolutions and device types.

J. Code for sites and applications built in this scope residing outside of WCM components must be stored and managed in IOP's instance of Bitbucket.
K. All updates required to IOP Portal Builder must be documented in IOP ATLAS.
L. Forms built as part of this scope will use IOP form builder capabilities.
M. Maps will utilize State mapping capabilities (currently ESRI).
N. Video streaming and storage will use IOP capabilities.
O. Site must be compliant with Federal and Ohio web accessibility requirements: all materials must be captioned and designed for Americans with Disabilities Act/Section 508 compliance as well as JAWS Screen reading technology. The Contractor is responsible for providing and performing accessibility and JAWS testing throughout the lifecycle of the project.
P. Site must be compatible with multiple browsers including but not limited to Google Chrome, Mozilla Firefox, Internet Explorer, Safari for Apple computers and iPhones and must be compatible with the current version and three previous versions of the browsers.

Organizational Change Management & Training

Q. Execution of organizational change management activities required for full adoption and roll-out of the new site and organizational impacts.
R. Processes and recommendations will be provided to assist internal and external end users adjust to the new solution.
S. All project and executive presentation material needed to solicit feedback and inform stakeholders and Agency leadership will be provided.
T. Agency site administrators and content managers/authors/owners must be provided hands on training to add/edit content, create/update sites and subsites via Portal Builder, as well as other available tools and accelerators, as appropriate.
U. User-centered Content First training must be provided to give authors clear tools to refine public-facing content that is optimally enabled to meet the needs of users.
V. Agency staff must be trained on running reports using analytics software.
W. Content author/owner training, analytics training, and Content-First methodology training must be delivered in a train the trainer model.

Deployment

X. All IOP hosted content must render on supported browsers in under a second.
Y. All needed steps to identify and elevate primary search engine results must be completed in support of the mission of the Agency.
Z. Hyper-care support must be provided that includes a stabilization period after go-live and details ongoing support services, including production support, application maintenance, and enhancements.

3.2.2 Project Requirements

A. Project must be completed by 05/31/2021 and staff training must be completed by 06/15/2021.

B. The Contractor will have the capability and capacity to perform content strategy and design, satisfy all requirements described in Section 3.1, and build/deploy the website(s).
C. The Contractor must have the capacity and ability to provide technical assistance and training to Agency staff including, but not limited to, the following activities: edit/modify editable forms and templates, update content, and run website analytics reports.
D. The Contractor must be able to adhere to IOP-hosted solution requirements, including use of Portal Builder as configured, hosted, and supported by DAS and per the requirements set forth herein.
E. The Contractor is responsible for travel expenses and cannot charge IOP or Agency for incurred expenses.

3.3 Deliverable Description

3.3.1 Detailed Description of Deliverables

A. The Contractor and Agency must agree upon deliverable dates. Once the project schedule and plan are set, the Contractor must meet specified deliverable timeframes. Any deviation from established schedule and plan requires prior written approval from Agency Project Manager and IOP Contract Manager or designee; and
B. Deliverables must be submitted to Agency Project Manager and IOP Contract Manager in the IOP-approved format; and
C. Deliverable acceptance criteria and time period for deliverable testing and acceptance must be established with Agency Project Manager and IOP Contract Manager within the first two weeks of project commencement; and
D. If a deliverable cannot be completed per the approved schedule and plan, the Contractor must notify the Agency Project Manager and IOP Contract Manager in writing, at least two weeks in advance of the deliverable deadline or agreed upon date on the approved schedule and plan, with the reason for the delay and proposed revision to the schedule. Proposed schedule revision must include the downstream impact and impact to the overall project; and
E. If Agency Project Manager determines a deliverable is no longer needed, Agency's Project Manager will provide this information in writing to the Contractor within 2 weeks. Monies cannot be reallocated; and
F. The IOP Contract Manager must approve any schedule revision prior to revision taking effect; and
G. Deliverable review will be conducted by the IOP Contract Manager and Agency designee within 5 working days of deliverable submission.

3.3.2 Descriptions by Deliverable Name

Deliverable Stage	Description of Deliverable	Payment eligible?	Acceptance Process
Project Management	**Kickoff Meeting** The kickoff meeting will be held at a location and time selected by the Agency where the Contractor and its staff will be introduced to the agency and will discuss project requirements and brand guidelines.	Yes	Teams are established, methods of collaboration, escalation methods are reviewed and documented.
Project Management	**Project Plan** Includes breakdown of tasks, milestones, deliverables, milestone dates, deliverable dates, owners, and critical path (baselined). Contractor will proactively maintain the baselined and approved project plan throughout the project.	Yes	Approved by Agency Project Manager and IOP Contract Manager. Delivered with ATLAS program management tool (access provided via IOP Platform).
Discovery & Design	**Requirements-Gathering Workshops** Documentation of non-functional, functional, and technical requirements.	Yes	Meeting was conducted; Agency input on information architecture. Approved by Agency Project Manager and IOP Contract Manager.
Discovery & Design	**UX and Content Strategies** Documentation of content strategy and UX strategy and design.	No	Collaborative agreement between the Agency, Contractors and IOP. To be approved by IOP Contract Manager before Agency presentation.
Discovery & Design	**Clickable Prototypes** The Contractor prepares the designs and demonstrates the clickable prototype(s) to the Agency.	Yes	Collaborative agreement between the Agency, Contractors and IOP. Low- and high-fidelity designs to be approved by IOP Contract Manager before Agency presentation.
Development	**Contractor Proposed Deliverable(s)**	Yes	Prior to execution of the SOW, the Agency and Contractor must

	The Contractor is to propose deliverables in support of the scope and the combined use of the IOP and their methodologies, which must be included in the response.		agree on all deliverables, payment eligibility, and acceptance process.
Development	**Fully functional website available for UAT** The final implementation of the website available to a limited number of staff and users to test.	No	Final website shared with focus group to gather feedback and adjust outcomes as needed and documented.
Development	**User Acceptance Testing (UAT) Completion** Feedback from both the UAT testers and the final focus group incorporated, and customer approval obtained.	No	Thorough mapping of customer journeys can be demonstrated with UAT Completed.
Organizational Change Management and Training	**Training and Transition Plan** In-Person staff training and documentation supporting knowledge transfer to site administrators and content authors/owner's on-going maintenance of site with reporting capabilities.	No	Agency project sponsor(s) and IOP Contract Manager acceptance of Transition plan documentation and training performance of Agency Staff.
Organizational Change Management and Training	**Change and Communication Plan** Detailed, sequenced plan for communicating to impacted stakeholders defining what is communicated to what stakeholder groups, by whom, when, and through which communication vehicle(s). Plan is based upon stakeholder identification and impact assessment.	Yes	Agency project sponsor(s) and IOP Contract Manager acceptance of Change and Communication plan documentation.
Deployment	**Final Project Summary** The Contractor is required to submit a final project summary to Agency and IOP before completion of	Yes	Agency project sponsor(s) and IOP Contract Manager acceptance.

	hypercare, including any modifications required to the style guide due to work performed. IOP will provide the Contractor with a report form template.		

3.3.3 Roles and Responsibilities

Project Activity Description	Contractor	State/IOP
Schedule kick-off meeting with all key stakeholders		X
Prepare kick-off meeting materials	X	X
Identify State stakeholders		X
Project plan	X	X
UAT completion	X	
Change and Communication plan	X	
Training and Transition Plan	X	
Final project summary	X	
Review and accept deliverables		X

3.3.4 Restrictions on Data Location and Work

The Contractor must perform all work specified in the SOW solicitation and keep all State data within the United States, and the Agency may reject any SOW response that proposes to do any work or make Agency data available outside the United States.

The Contractor must maintain all Agency data on a secure data storage unit (hard drive, USM, etc.). If multiple storage units are necessary, Agency must be notified. Data provided by Agency will be used solely for the creation of this website.

3.3.5 Resource Requirements

Agency expects the Contractor to perform their required work at the Agency's location.

The Contractor must provide any and all equipment they need to perform activities at their workplace.

The Contractor must clearly identify technology and tools they will use to develop the site and any software licensing that needs to be purchased.

Section 4: Deliverables Management

4.1 Submission Format

The Contractor must follow the IOP program management methodology and submit weekly IOP status reports, captured every Wednesday during the contracting period. The weekly report must include specific information about the progress of the project. The project must be tracked and reported using the Agency's ATLAS project management tool.

The final project summary must be submitted at a date/time TBD in a format based on a template provided by IOP.

4.2 Reports and Meetings

The Contractor must conduct weekly status meetings with Agency Project Manager. Agency Project Manager will establish meeting date/time/location. Meetings will be held in person or virtually as agreed.

The Contractor must update status within IOP ATLAS status reporting tool that includes work performed and completed for the current week and planned work for the subsequent week; and documentation of issues and risks encountered or outstanding, with an explanation of the cause and real or proposed resolution.

The Contractor is required to provide the IOP with a weekly status reports summary. Status reports are due to IOP by 3 p.m. each Wednesday; an extract will be pulled from the IOP ATLAS tool.

4.3 Period of Performance

This project is expected to be completed on or before 05/31/21. Performance is based on the delivery and acceptance of each deliverable.

4.4 Performance Expectations

This section establishes performance specifications for the service level agreements (SLA) between the Contractor and Agency.

4.4.1 Fee at Risk

Most individual service levels are linked to "fee at risk" due to the Agency to incent the Contractor performance.

Both the Agency and the Contractor recognize and agree that service levels and performance specifications may be added or adjusted by mutual agreement during the term of the contract as business, organizational objectives, and technological changes permit or require.

The Contractor agrees that 10% of the not-to-exceed fixed price for the SOW will be at risk ("fee at risk"). The fee at risk will be calculated at follows:

Total Not to Exceed Fixed Price (NTEFP) of the SOW	X	10%	=	Total Fee at Risk for the SOW

Furthermore, in order to apply the fee at risk, the following monthly calculation will be used:

Monthly Fee at Risk = Total Fee at Risk for the SOW ÷ Term of the SOW in months

4.4.2 Performance Credit

The Contractor will be assessed for each SLA failure, and the "performance credit" shall not exceed the monthly fee at risk for that period. The performance credit is the amount due to the Agency for the failure of the SLAs. For SLAs measured on a monthly basis, the monthly fee at risk applies and is cumulative.

On a monthly basis, there will be a "true-up" at which time the total amount of the performance credit will be calculated (the "net amount"), and such net amount may be offset against any fees owed by the State to the Contractor, unless the State requests payment in the amount of the performance credit.

The Contractor will not be liable for any failed SLA caused by circumstances beyond its control, and that could not be avoided or mitigated through the exercise of prudence and ordinary care, provided that the Contractor promptly notifies performance of the services in accordance with the SLAs as soon as reasonably possible.

To further clarify, the performance credits available to the State will not constitute the Agency's exclusive remedy to resolving issues related to the Contractor's performance. In addition, if the Contractor fails multiple service levels during a reporting period or demonstrates a pattern of failing a specific service level throughout the SOW, then the Contractor may be required, at the Agency's discretion, to implement a State-approved corrective action plan to address the failed performance.

SLAs will commence when the SOW is initiated.

4.4.3 Monthly Service Level Report

On a monthly basis, the Contractor must provide a written report (the "monthly service level report") to the State which includes the following information:

- Identification and description of each failed SLA caused by circumstances beyond the Contractor's control and that could not be avoided or mitigated through the exercise of prudence and ordinary care during the applicable month;
- The Contractor's quantitative performance for each SLA;

- The amount of any monthly performance credit for each SLA;
- The year-to-date total performance credit balance for each SLA and all the SLAs;
- Upon Agency request, a root-cause analysis and corrective action plan with respect to any SLA where the individual SLA was failed during the preceding month; and
- Trend or statistical analysis with respect to each SLA as requested by the Agency.

The Monthly Service Level Report will be due no later than the 10th day of the following month.

SLA	Performance Evaluated	Non-Conformance Remedy	Frequency of Measurement
Deliverable Acceptance	Measures the State's ability to accept Contractor deliverables based on submitted quality and in keeping with defined and approved content and criteria for Contractor deliverables in accordance with the terms of the contract and the applicable SOW. The Contractor must provide deliverables to the State in keeping with agreed levels of completeness, content quality, content topic coverage and otherwise achieve the agreed purpose of the deliverable between the State and the Contractor in accordance with the contract and the applicable SOW. Upon mutual agreement, the service level will be calculated / measured in the period due, not in the period submitted. Consideration will be given to deliverables submitted that span multiple measurement periods. The measurement period is a month. The first monthly measurement period will commence on the first day of the first full calendar month of the contract, and successive monthly measurement period will run continuously thereafter until the expiration of the applicable SOW. **Compliance with deliverable acceptance is expected to be greater than 95%.** This SLA is calculated as follows: "% Deliverable Acceptance" = "# Deliverables accepted during period" ÷ "# Deliverables submitted for review/acceptance by the State during the period".	Fee at Risk	Project schedule

4.5 Agency Staffing Plan

Staff/Stakeholder Name	Project Role	% Allocated

IOP Program Lead	Program Lead / Contract Manager, second level of IOP escalation	As needed
IOP Project Manager	Program and project compliance; first point of IOP escalation	10% or as needed
Agency Project Sponsors	Agency management; manage according to schedule, schedule meetings, update necessary stakeholders	As needed
Agency Project Manager	Project management; manage according to schedule, schedule meetings, update necessary stakeholders	As needed
Agency Content Contributors	Agency content contributors – Communications Director and Assistant Director, Digital Media Manager, Public Information Officers, HR staff member(s)	As needed

Section 5: Proposal Response Submission Requirements

5.1 Response Format and Content Requirements

An identifiable tab sheet must precede each section of a proposal, and each Proposal must follow the format outlined below. All pages, except preprinted technical inserts, must be sequentially numbered.

Each Proposal must contain the following:

1. Cover letter with signature
2. Offeror experience requirements (see evaluation Section 6 for details on required content)
3. Subcontractors documentation
4. Assumptions
5. Payment address
6. Project staffing plan and matrix, personnel requirements, time commitment, organizational chart
7. Contingency plan
8. Project plan
9. Proposed project schedule (WBS using MS Project or compatible)
10. Change and Communication plan
11. Risk management plan
12. Quality management plan
13. Training and Transition plan
14. Fee structure including estimated work effort for each task/deliverable
15. Rate card

5.1.1 Cover Letter

a. Must be in the form of a standard business letter;
b. Must be signed by an individual authorized to legally bind the offeror;
c. Must include a statement regarding the offeror's legal structure (e.g., an Ohio corporation), federal tax identification number, and principal place of business listing any Ohio locations or branches;
d. Must include a list of the people who prepared the proposal, including their titles; and
e. Must include the name, address, email, phone number, and fax number of a contact person who has the authority to answer questions regarding the proposal.

5.1.2 Offeror's Experience Requirements

a. Offeror's Proposal must include a brief executive summary of the services the offeror proposes to provide and at least one representative example of previously completed projects of similar size and scope (e.g., detailed requirements documents, analysis). Include project description, who it was for, assessment of project results and name of a contact person;
b. Offeror's Proposal must include a *staffing executive experience summary* of the services the offeror proposes to provide by proposed consultant with at least three representative examples of previously completed projects of similar size and scope *<u>by proposed staff member in the same role proposed</u>*. Include Contractor name, project description, role held in project, who it was for, and contact person at client (name, title, phone, e-mail);
c. Offeror's Proposal must include at least one representative example of previously completed projects demonstrating experience in creating a website that interfaces with professionals and the general public. One example must include details of an awareness campaign conducted by the offeror or its subcontractor Include project description, who it was for, and name of contact person; and
d. The offeror must demonstrate knowledge of the following:
    - Website content writing and design, social media, analytics and all functionality requirements provided in Section 3.1;
    - Website construction; and
    - Capacity to provide technical assistance to Agency staff including, but not limited to, training Agency staff on editing/modifying templates, updating website content and training Agency staff on analytics so they can run reports.

5.1.3 Subcontractor Documentation

For each proposed subcontractor, the offeror must attach a letter from the subcontractor, signed by someone authorized to legally bind the sub, with the following included:

a. The subcontractor's legal status, federal tax identification number, D-U-N-S number if applicable, and principal place of business address;
b. The name, phone number, fax number, email address, and mailing address of a person who is authorized to legally bind the subcontractor to contractual obligations;
c. A description of the work the subcontractor will do and one representative sample of previously completed projects as it relates to this SOW (e.g., detailed requirements document, analysis, statement of work);
d. Must describe the subcontractor's experience, capability, and capacity to provide information technology assessment, planning, and solicitation assistance. Provide specific detailed information demonstrating experience similar in nature to the type of work described in this SOW from each of the resources identified in Section 6. The detailed information must include examples relevant to this project's needs and requirements;
e. A commitment to do the work if the offeror is selected; and
f. A statement that the subcontractor has read and understood the IFP and will comply with the requirements of the IFP.

5.1.4 Assumptions

The offeror must list all assumptions the offeror made in preparing the proposal. If any assumption is unacceptable to the Agency, the State may at its sole discretion request that the offeror remove the assumption or choose to reject the proposal. No assumptions can be included regarding the outcomes of negotiation, terms and conditions, or requirements.

Assumptions must be provided as part of the offeror's response as a stand-alone response section that is inclusive of all assumptions with reference(s) to the section(s) of the RFP that the assumption is applicable to. The offeror must not include assumptions elsewhere in their response.

5.1.5 Payment Address and Invoicing

The offeror must give the remit to address to the State for payment on completed and approved activities/deliverables per the terms of the contract. All request for payment must be on a proper invoice referencing the purchase order number and the activity/deliverable completed.

5.1.6 Staffing Plan, Personnel Resumes, Time Commitment, Organizational Chart

Identify offeror and subcontractor staff and time commitment. Identify hourly rates for personnel, as applicable. Include offeror and subcontractor resumes for each resource identified and an organizational chart for entire team.

Proposal must include a staffing executive experience summary of the services the offeror proposes to provide and at least three representative examples of previously completed projects with a value of at least $100,000 by proposed staff member in the role proposed. Include

Contractor name, project description, role held in project, who it was for, and contact person at client (name, title, phone, e-mail).

Contractor Name	Role	Contactor or Subcontractor?	# Hours	Hourly Rate

5.1.7 Contingency Plan

Identify and provide a contingency plan should the Contractor and subcontractor staff fail to meet the project schedule, project milestones, or fail to complete the deliverables according to schedule. Include alternative strategies to be used to ensure project success if specified risk events occur.

5.1.8 Project Plan

Provide a high-level project plan that satisfies all project objectives and includes all parts of the SOW including meeting all website content and functionality requirements outlined in Section 3.1, along with all project deliverables. Describe the primary tasks, how long each task will take, and when each task will be completed in order to meet final deadline.

5.1.9 Project Schedule

Provide a high-level project schedule that falls within the project duration and meets the entire project schedule outlined in Section 2.3.

5.1.10 Change and Communication Plan

Proposal includes a high-level change and communication plan that complies with all project reporting requirements.

5.1.11 Risk Management Plan

Provide a risk management plan including the risk factors, associated risks, and assessment of the likelihood of occurrence and the consequences for each risk. Describe your plan for managing selected risks and for informing people about those risks throughout the project.

5.1.12 Quality Management Plan

Provide a quality management plan to explain your quality policies, procedures, and standards relevant to the project for both project deliverables and project processes. Define who is responsible for the quality of the delivered project artifacts and deliverables.

5.1.13 Training and Transition Plan

Provide a detailed training and transition plan that meets the requirements of this SOW.

5.1.14 Fee Structure

Provide a detailed fee structure including estimated work effort for each deliverable. Payment will be scheduled upon approval and acceptance of each deliverable by Agency within the usual payment terms of the State.

Deliverable	Total Estimated Work Effort (Hours)	Not-to-Exceed Fixed Cost for Deliverable
Kickoff Meeting		
Project Plan		
Requirements-Gathering Workshops		
UX and Content Strategies		N/A
Clickable Prototypes		
Contractor Proposed Deliverable(s) including description (add additional lines as appropriate)		
Fully Functional website available for UAT		N/A
UAT Completion		N/A
Training and Transition Plan		N/A
Change & Communication Plan		
Final Project Summary		
	Total Not-to-Exceed Fixed Cost for all deliverables	

5.1.15 Rate Card

The primary purpose of obtaining a rate card is to establish baseline hourly rates in case change orders are necessary. This contract is not intended to be used for hourly-based time and materials work.

Offerors must submit a rate card that includes hourly rates for all services the offeror provides.

Position Title	Hourly Rate	
	$	
	$	
	$	
	$	
	$	

Section 6: Proposal Evaluation Criteria

6.1 Offeror Requirements

The Contractor must be capable of meeting the project duration and project schedule timeline outlined in Section 2.3. Due to the requirements of this scope, the abilities of the proposed staff will be a major factor used in the scoring of the proposals as these are the staff that will carry out the scope of work. Proposed staff will be required to complete work and SOW may be cancelled if proposed staff is unavailable during project.

The Contractor must also submit Proposal on time with all required components fully completed.

6.2 Scored Requirements

Requirements	Weight	Does Not Meet	Partially Meets	Meets	Exceeds
Proposal Administration Offeror's Proposal submitted on time and contains all required sections and content defined in Section 5.1.	2	0	3	5	7
Offeror's Proposed Staff Previous Experience Proposal must include an executive summary of the services the offeror proposes to provide	5	0	3	5	7

and at least three representative examples of previously completed projects with a value of at least $100,000 by proposed staff member in the role proposed. Include project description, who it was for, assessment of project results and name of a contact person.					
Offeror's Previous Experience Offeror must provide previous examples of website information architecture design, content rationalization, content design, social media, analytics, and all functional requirements provided in Section 3.1.	4	0	3	5	7
Staffing Plan and Appropriateness Proposal includes staffing plan and matrix containing personnel resumes, time commitment information, and an organizational chart.	4	0	3	5	7
Contingency Plan Proposal includes a detailed contingency plan.	1	0	3	5	7
Project Plan and Project Schedule Proposal includes a high-level project plan and project schedule that meets all the requirements and timelines of this project.	4	0	3	5	7
Change and Communication Plan Proposal includes a high-level change and communication plan that complies with all project reporting requirements.	4	0	3	5	7
Risk Management Plan Proposal includes a detailed risk management plan.	1	0	3	5	7
Quality Management Plan Proposal includes a detailed quality management plan.	3	0	3	5	7
Training and Transition Plan Proposal includes a detailed training and transition plan that clearly defines transition of support to Agency.	3	0	3	5	7

6.3 Price Performance Formula

The evaluation team will rate the Proposals that meet the mandatory requirements based on the following criteria and respective weights.

Technical Proposal 80% **Cost Summary 20%**

To ensure the scoring ratio is maintained, the State will use the following formulas to adjust the points awarded to each offeror.

The Total Points Score is calculated using the following formula:

Total Points = Technical Proposal Points + Cost Summary Points

6.3.1 Technical Proposal Points

The offeror with the highest point total for the technical Proposal will receive 800 points. The remaining offerors will receive a percentage of the maximum points available based upon the following formula:

Technical Proposal Points =
(Offeror's Total Technical Points for Evaluation ÷ Highest Total Technical Point Proposal) x 800

6.3.2 Cost Summary Points

The offeror with the lowest proposed total cost for evaluation purposes will receive 200 points. The remaining offerors will receive a percentage of the maximum cost points available based upon the following formula:

Cost Summary Points =
(Lowest Total Cost for Evaluation ÷ Offeror's Total Cost for Evaluation) x 200

The Agency may reject any Proposal if the offeror takes exception to the terms and conditions of the contract.

The Agency has the right to waive any defects in any quotation or in the submission process followed by an offeror. The Agency will only do so if it believes that it is in the Agency's interest and will not cause any material unfairness to other offerors.

The Agency may reject any submission that is not in the required format, does not address all the requirements of this SOW solicitation, or that the State believes is excessive in price or otherwise not in its interest to consider or to accept.

The Agency will reject any responses from companies not prequalified in the technology category associated with this SOW solicitation. In addition, the State may cancel this SOW solicitation, reject all the submissions, and seek to do the work through a new SOW solicitation or other means.

Section 7: Solicitation Calendar of Events

7.1 Firm Dates

Sow Solicitation released to prequalified Contractors	02/24/2021
Inquiry Period begins	02/24/2021
Pre-bid Conference	02/26/2021 at 1:00 p.m. EST

Microsoft Teams meeting

Join on your computer or mobile app

Click here to join the meeting

Join with a video conferencing device

682042763@t.plcm.vc

Video Conference ID: 114 864 528 4

Alternate VTC dialing instructions

Or call in (audio only)

+1 614-721-2972,,353584520#   United States, Columbus

Phone Conference ID: 353 584 520#

Inquiry Period ends	03/05/2021 at 8:00 a.m. EST
Proposal Response due	03/10/2021 at 1:00 p.m. EST

7.2 Anticipated Dates

Estimated date for selection of awarded Contractor	03/17/2021
Estimated date for commencement of work	03/29/2021

Section 8: Inquiry Process

8.1 Submitting an Inquiry

Offerors may make inquiries regarding this SOW solicitation anytime during the inquiry period listed in the calendar of events. To make an inquiry, offerors must use the following process:

1. Access the State's procurement website at http://procure.ohio.gov/
2. From the navigation bar on the right, select **Bid Opportunities Search**
3. Enter the IOP Solicitation ID number found on the first page of this SOW solicitation in the Document/Bid Number box
4. Click on the **Search** button
5. On the document information page, click the **Submit Inquiry** button
6. On the document information page, complete the required Personal Information section by providing:
    a. First and last name of the offeror's representative responsible for the inquiry

    b. Name of the offeror
    c. Representative's business phone number
    d. Representative's email address
7. Type the inquiry in the space provided, including:
    a. A reference to the relevant part of this SOW solicitation
    b. The heading for the provision under question
    c. The page number of the SOW solicitation where the provision can be found
8. Click the **Submit** button

8.2 Inquiry Response and Viewing

An offeror submitting an inquiry will receive an acknowledgement that the State has received the inquiry as well as an email acknowledging receipt. The offeror will not receive a personalized response to the question nor notification when the State has answered the question.

Offerors may view inquiries and responses on the State's procurement website by using the same instructions described above and by clicking the **View Q&A** button on the document information page.

The State usually responds to all inquiries within 3 business days of receipt, excluding weekends and State holidays. The State will not respond to any inquiries received after 8:00 a.m. on the inquiry end date.

Section 9: Submission Instructions & Location

9.1 Submission Instructions

Each Offeror must submit 6 complete, sealed and signed physical bound copies of its Proposal response and each submission must be clearly marked **DXDAS-21-01-001 OWT Digital Resource Finder Tool** on the outside of its package, along with the offeror's name.

A single electronic copy of the complete Proposal Response must also be submitted with the printed Proposal Responses. Electronic submissions should be on a CD, DVD, or USB memory stick.

Each Proposal must be organized in the same format as described in Section 5. Any material deviation from the format outlined in Section 5 may result in a rejection of the non-conforming proposal. Each Proposal must contain an identifiable tab sheet preceding each section of the proposal. Proposal response should be good for a minimum of 60 days.

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

9.2 Submission Location

Proposal Responses MUST be submitted in digital and five (5) hard copies to the agency's representative at the following address:

Agency: Office of Workforce Transformation

Attention: Henry Harned

Address: **77 S High Street, 24 Floor**

Columbus, OH 43215

9.3 Proprietary Information

All Proposal responses and other material submitted will become the property of the State and may be returned only at the Agency's option.

If an offeror includes in its Proposal confidential, proprietary, or trade secret information, it must also submit a complete redacted version of its technical Proposal in accordance with confidential, proprietary or trade secret information that follows.

A. Offerors shall only redact (black out) language that is exempt from disclosure pursuant to Ohio Public Records Act.
B. Offerors must also submit an itemized list of each redaction with the corresponding statutory exemption from disclosure.
C. The redacted version must be submitted as an electronic copy in a searchable PDF format.

The redacted version, as submitted, will be available for inspection and released in response to public records requests. If a redacted version is not submitted, the original submission of the Proposal will be provided in response to public records requests. Additionally, all Proposal response submissions will be open to the public after the contract has been awarded.