



OAKS Agency Engagement Enterprise Rollout

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

State Term Schedule Only

MBE Preferred

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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 four (4) consulting positions:

- OAKS Agency Engagement Lead
- OAKS Agency Engagement Consultant
- OAKS Enterprise Rollout Financials Organizational Change Management Lead
- OAKS Enterprise Rollout HCM Organizational Change Management Lead

OAKS AGENCY ENGAGEMENT and ENTERPRISE ROLLOUT PROJECT

The State of Ohio is requesting resume(s) and quotation(s) for four (4) full-time positions such as two Agency Engagement Roles with Business Transformation Experience and two Organizational Change Management Lead Roles with Prosci Methodology Experience. These roles are needed with the intent for a renewal on July 1, 2016 and each proceeding fiscal year of the OAKS Agency Engagement and Enterprise Rollout Project.

BACKGROUND

The OAKS Agency Engagement and Enterprise Rollout Project is essential for transitioning 66 State agencies and 37 higher education units with new OAKS services and functionality. Agency Engagement will benefit each State agency by preparing them for the new OAKS system enhancements and business processes. More than 4,000 active users across the State of Ohio will benefit from these business transformation onboarding activities. The OAKS Agency Engagement and Enterprise Rollout Project will be responsible for conducting business process workshops, security role mapping, readiness assessments, and developing onboarding kits for each unit.

Scope of Work

The scope of work is to perform several analyses, establish a governance structure, and implement an OAKS Agency Center with the following work products:

1. Establish an OAKS Agency Engagement Team with a written vision, mission and objectives.
2. Establish a core OAKS Agency Engagement Leadership Committee with documented roles and responsibilities.
3. Train the core OAKS Agency Engagement Leadership Committee and key stakeholders in Prosci® methodology. The contractor should be a Prosci authorized training provider.
4. Develop and document enterprise onboarding standards that will govern agency engagement, process standardization, communications, and training.
5. Create an agency liaison network and develop liaison meeting presentations for OAKS initiatives.
6. Develop materials and conduct presentations for agency business process workshops, security role mapping sessions, readiness assessments, and onboarding kits for each new project (e.g., OAKS Financials, learning management, grants, and eCatalog). Contractor needs to be experienced in using Prosci's ADKAR methodology for organizational change management. Contractor will develop the following action plans:

- a. Enterprise Rollout Organizational Change Management Impact Assessment
- b. Enterprise Rollout Sponsor Roadmap
- c. Enterprise Rollout Communication Plan
- d. Enterprise Rollout Training Plan
- e. Enterprise Rollout Agency Readiness Plan
- f. Enterprise Rollout Coaching Plan
- g. Enterprise Rollout Resistance Management Plan
- h. Enterprise Rollout Reinforcement Plan

Contractor Requirements

1. **Mandatory Requirement** - Contractor needs to be experienced in using Prosci's ADKAR methodology for organizational change management.
2. **Preferred Requirement** - The contractor should be a Prosci authorized training provider.

Length of Contract

The scope of these services would be needed for approximately three years. We expect four (4) full-time people onsite in Columbus for five days a week.

Project Staffing Overview

1. **Two Agency Engagement Roles with Business Transformation Experience** – These business transformation professionals need to understand all components of agency engagement so that OAKS can establish comprehensive organizational change management standards. These positions are experienced change practitioners who have conducted business process reengineering, communications, training, and business readiness.
2. **Two Organizational Change Management Lead Roles with Prosci Methodology Experience** These business transformation professionals need to understand all components of agency readiness so that OAKS Enterprise Program (e.g., FIN, HCM, ELM, BI, etc.) can be fully adopted by all State agencies and higher education entities. These positions are experienced change practitioners who have conducted business process reengineering, communications, training, and business readiness.

Project Staffing Roles and Responsibilities

1. **OAKS Agency Engagement Lead** – 1 FTE; Onsite 100%

Role	OAKS Agency Engagement Program Lead
Relevant Experience	<p>Mandatory:</p> <ul style="list-style-type: none"> a. At least 10 years of organizational change management experience. b. Prosci-certified Change Practitioner. c. At least 10 years of business consulting experience. d. At least 10 years of software implementation experience e. PMP certified f. PeopleSoft implementation experience <p>Preferred:</p> <ul style="list-style-type: none"> a. At least 5 years of project management experience. b. Government or higher education experience. c. Lean Six Sigma experience.
Required Education	<ul style="list-style-type: none"> - Bachelor's or master's degree in marketing, communication, journalism, business or related field.
Role Description	<ul style="list-style-type: none"> a. Establish an OAKS Agency Engagement Team with a written vision, mission and objectives. b. Establish a core OAKS Agency Engagement Leadership Team with documented roles and responsibilities. c. Create and manage enterprise OCM strategy, which includes the State's recommended approaches for communication, business readiness and training. d. Provide strategic direction for project OCM agency engagement team resources. e. Develop and document enterprise onboarding standards that will govern agency engagement, process standardization, communications, and training. f. Lead and support the planning and execution of the communication strategy, training strategy, and agency readiness activities. g. Actively coach leaders who are change sponsors. h. Identify resistance and performance gaps, and work to develop and implement corrective actions. i. Work through key organizational sponsors/leaders to ensure change management plans are implemented successfully. j. Work with project managers and State OCM lead to integrate key change management activities into the overall project plan. k. Ensure that leading practice OCM agency engagement standards are recommended and implemented. l. Present at agency liaison meetings. m. Report business and agency readiness to OAKS leadership and sponsors.

2. OAKS Agency Engagement Consultant – 1 FTE; Onsite 100%

Role	OAKS Agency Engagement Program Consultant
Relevant Experience	<p>Mandatory:</p> <ul style="list-style-type: none"> a. At least 7 years of organizational change management experience. b. Prosci-certified Change Practitioner. c. At least 7 years of business consulting experience. d. At least 7 years of software implementation experience <p>Preferred:</p> <ul style="list-style-type: none"> a. At least 5 years of project management experience. b. Government or higher education experience. c. PMP certification. d. Lean Six Sigma experience.
Required Education	<ul style="list-style-type: none"> - Bachelor's or master's degree in marketing, communication, journalism, business or related field.
Role Description	<ul style="list-style-type: none"> a. Assist with establishing an OAKS Agency Engagement Team with a written vision, mission and objectives. b. Assist with establishing a core OAKS Agency Engagement Leadership Team with documented roles and responsibilities. c. Manage enterprise OCM strategy, which includes the State's recommended approaches for communication, business readiness, and training. d. Document enterprise onboarding standards that will govern agency engagement, process standardization, communications, and training. e. Support the planning and execution of the communication strategy, training strategy, and agency readiness activities. f. Actively coach leaders who are change sponsors. g. Identify resistance and performance gaps, and work to develop and implement corrective actions. h. Work through key organizational sponsors/leaders to ensure change management plans are implemented successfully. i. Work with project manager and State OCM lead to integrate key change management activities into the overall project plan. j. Ensure that leading practice OCM agency engagement standards are recommended and implemented. k. Document issues that are raised by the OCM agency engagement project teams. l. Present at agency liaison network and other agency meetings. m. Report business and agency readiness to OAKS leadership and sponsors.

3. OAKS Enterprise Rollout Financials Organizational Change Management Lead – 1 FTE

On-site: 100%

Role	OAKS Enterprise Rollout Financials Lead
Relevant Experience	<p>Mandatory:</p> <ul style="list-style-type: none"> a. At least 10 years of organizational change management experience. b. Prosci-certified Change Practitioner. c. At least 10 years of business consulting experience. d. At least 10 years of software implementation experience e. At least 2 years of experience with PeopleSoft Financials <p>Preferred:</p> <ul style="list-style-type: none"> a. At least 5 years of project management experience. b. Government or higher education experience. c. PMP certification. d. Lean Six Sigma experience.
Required Education	<ul style="list-style-type: none"> - Bachelor's or master's degree in marketing, communication, journalism, business or related field.
Role Description	<ul style="list-style-type: none"> a. Develop organizational change management strategies for OAKS Enterprise Rollout Financials-related projects b. Develop and document enterprise rollout project standards that will govern agency engagement, process standardization, communications, and training. c. Lead and support the planning and execution of the communication strategy, training strategy, and agency readiness activities. d. Identify change impacts for statewide rollout of new functionalities. e. Identify resistance and performance gaps, and work to develop and implement corrective actions. f. Create an enterprise learning program strategy by working with executive sponsors. g. Work with business leads and curriculum managers to identify target learners, determine educational needs, and recommend best delivery modes for learning and development programs. h. Work with project managers and State OCM lead to integrate key change management activities into the overall project plan. i. Ensure that leading practice OCM agency engagement standards are recommended and implemented. j. Resolve issues that are raised by the OCM agency engagement project teams. k. Present at agency liaison meetings. l. Report business and agency readiness to OAKS leadership and sponsors.

4. OAKS Enterprise Rollout HCM Organizational Change Management Lead – 1 FTE
On-site: 100%

Role	OAKS Enterprise Rollout HCM Lead
Relevant Experience	<p>Mandatory:</p> <ul style="list-style-type: none"> a. At least 10 years of organizational change management experience. b. Prosci-certified Change Practitioner. c. At least 10 years of business consulting experience. d. At least 10 years of software implementation experience e. At least 2 years of experience with PeopleSoft HCM <p>Preferred:</p> <ul style="list-style-type: none"> f. At least 5 years of project management experience. g. Government or higher education experience. h. PMP certification. i. Lean Six Sigma experience j. Learning Management Solution experience.
Required Education	<ul style="list-style-type: none"> - Bachelor's or master's degree in marketing, communication, journalism, business or related field.
Role Description	<ul style="list-style-type: none"> a. Develop organizational change management strategies for OAKS Enterprise Rollout Human Capital Management-related projects b. Develop and document enterprise rollout project standards that will govern agency engagement, process standardization, communications, and training. c. Lead and support the planning and execution of the communication strategy, training strategy, and agency readiness activities. d. Identify change impacts for statewide rollout of new functionalities. e. Identify resistance and performance gaps, and work to develop and implement corrective actions. f. Create an enterprise learning program strategy by working with executive sponsors. g. Work with business leads and curriculum managers to identify target learners, determine educational needs, and recommend best delivery modes for learning and development programs. h. Work with project managers and State OCM lead to integrate key change management activities into the overall project plan. i. Ensure that leading practice OCM agency engagement standards are recommended and implemented. j. Resolve issues that are raised by the OCM agency engagement project teams. k. Present at agency liaison meetings. l. Report business and agency readiness to OAKS leadership and sponsors.

ADMINISTRATIVE

DUE DATES

All quotations are due by 1:00 pm, EST, on March 16, 2016. 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	March 10, 2016
2. Proposal/Quotation Due Date	1:00 p.m., March 16, 2016
3. Questions from Vendors/Responses to Vendors	Inquiries are not permitted for this procurement.
4. Target Date for Review of Proposal/Quotation	March 17, 2016 – March 18, 2016
5. Anticipated date of interview of candidates, if needed	Week of March 21, 2016
6. Anticipated decision and selection of Vendor	By March 31, 2016
7. Anticipated commencement date of work	April 4, 2016

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.
- 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 vendor provided equipment (i.e. laptop computers, mobile phones, etc.) and will follow State security policies.
- 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 "**OAKS AGENCY ENGAGEMENT and ENTERPRISE ROLLOUT PROJECT**" 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 "**OAKS AGENCY ENGAGEMENT and ENTERPRISE ROLLOUT PROJECT**" 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)
 - Cover Letter containing the following information:
 - a) A list of any subcontractors that will be working on the project;
 - b) A statement certifying the Vendor is a business entity and will not submit the Independent Contractor/Worker Acknowledgement to the ordering agency;
 - c) State Term Schedule Number;
 - d) A statement acknowledging that the Standard Affirmation and Disclosure Form (EO 2011-12K) that was signed during the State Term Schedule submission remains in effect; and
 - e) A statement acknowledging that the Vendor understands that changing personnel after the award without the State's consent may be a basis for termination of the work.

- MBE or EDGE Certification – ***if applicable***
- State Term Schedule Number
- STS Labor Category Code
- Candidate Information:
 - Candidate Resume(s)
 - 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, 39th 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.

An on-site interview will be required prior to the selection of a candidate.

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.

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

ATTACHMENT ONE

PERSONNEL PROFILE SUMMARY

CANDIDATE REFERENCES CONTINUED

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

