

NOTICE

This opportunity is being release to Deliverable Based IT Services (DBITS) Contractors pre-qualified as a result of Information Technology Deliverable Based Services RFP #0A1147.

This opportunity is being released to DBITS Contractors pre-qualified as a result of Open Market RFP #0A1147. Only Contractors pre-qualified in the Project Management Category are eligible to submit proposal responses and to submit inquiries. The State does not intend to respond to inquiries submitted by organizations not pre-qualified in this Technology Category.

An alphabetical listing of Contractors pre-qualified to participate in this opportunity follows:

Accenture	IBM	Public Consulting Group
Advocate Consulting Group	IIT	Quantrum LLC
Advocate Solutions LLC	Infojini	R. Dorsey & Company
Ardent Technologies	Information Control Company	Sense Corp
Berry Dunn	Information Services Group, Inc.	Sogeti USA, LLC
CapTech Ventures	JMT Technology Group	Sondhi Solutions
Cardinal Solutions Group	Kunz, Leigh & Associates	System Soft Technologies
CDI Corp	Lochbridge	Systems Technology Group, Inc.
Centric Consulting LLC	MAXIMUS Human Services, Inc.	TCC Software Solutions
CGI Technologies and Solutions, Inc.	McGladrey LLP	Teranomic
CMA Consulting Services	Menya Communications	The Greentree Group
Computer Aid, Inc.	MGT of America, Inc.	UMT Consulting
Crowe Horwath LLP	Navigator Management Partners LLC	Unicon International. Inc.
CSG Government Solutions	PCM Sales, Inc.	Vertex
First Data	Peerless Technologies	Wild Goose Enterprises, Inc.
Gartner	Persistent Systems	Windsor Solutions
Halcyon	Pomeroy IT Solutions	Xerox State & Local Solutions
HMB, Inc.	Prelude System	

Statement of Work Solicitation Template

 <p>State of Ohio Ohio Department of Medicaid (ODM) Project Name: Project Management (PMO) Setup initiative Project Statement of Work</p>	DBITS Solicitation ID No.	Solicitation Release Date	
	DBMCD-16-02-001	04-21-2016	
Section 1: Purpose			
<p>The purpose of this Project Statement of Work (SOW) is to provide Ohio Department of Medicaid (ODM) with information technology services in the Project Management Category improving its processes regarding the Project Management Office (PMO) Governance, Mentorship, Management, and setup. A qualified Contractor, herein after referred to as the “Contractor”, shall furnish the necessary services to the perform work set forth in Section 3, <i>Scope of Work</i>.</p>			
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2.1 Agency Information			
Agency Name	Ohio Department of Medicaid		
Contact Name	Brian Smith Joseph Pichert	Contact Phone	(614) 752-3602 (614) 752-4449
Bill to Address			
2.2 Project Information			

Project Name	Project Management Office (PMO) Setup Initiative
Project Background & Objective	<p>Medicaid is the largest health payer in Ohio. ODM serves as the single State agency responsible for the administration of the Medicaid Program. ODM has an annual benefits budget of about \$15 billion (SFY 2015), serves more than 2.7 million Ohio residents, and has more than 92,000 providers supporting the program. In July 2013, ODM separated from the Ohio Department of Job and Family Services and formed a Cabinet-Level Agency. Since inception, ODM has grown, re-organized, and has been in the process of many strategic planning events. Like many states, Ohio continues to struggle with balancing growing demands for entitlement programs while simultaneously, implementing a new eligibility system, converting from a 209b state to a 1634 state, and undergoing a transformation. Ohio continues to look for opportunities to improve service delivery, reduce duplication, and gain greater efficiencies while transforming and improving health care outcomes and the health system's performance.</p> <p>In support of these initiatives and the ongoing Medicaid operations the ODM PMOs are tasked with running many of the work streams while simultaneously attempting to develop procedures, processes, performance standards and educating staff to deliver on customer expectations. The current ODM PMO is a loosely coupled organization of various project managers and business analysts spread among multiple ODM offices.</p> <p>Project Objective: Increased project management customer satisfaction and effectiveness through the development and adoption of an ODM standard project and portfolio management methodology and organizational change.</p> <p>Tangible Benefits to ODM include:</p> <ol style="list-style-type: none"> 1. Measureable improvements in ODM project execution 2. Measurable improvements in customer, employee, executive, management and program staff satisfaction through the creation and effective use of documented ODM procedures, processes, standards, staffing levels and staff performance expectations 3. Measureable improvements in ODM enterprise partner satisfaction through the creation and execution of ODM's Portfolio Management methodology including procedures for resource investments (staff, funding and material), project prioritization, cross agency and enterprise impact analysis, reporting, standards (staffing, tools, methods, etc.) and increases in collaboration among the various vendor and HHS PMOs
Expected Project Duration	<i>Provide expected overall project duration in this area. Clearly indicate whether date information is an estimated date or a firm date. Estimated date ranges may be used as appropriate. Lower level Project Schedule and Milestones should be include in Sections 2.3 and 2.4</i>
2.3 Project Schedule	
Date	Task
6/1/2016	Project Kick off meeting
6/3/2016	Status report from vendor

Date	Task
6/6/2016	Project Status Meeting
6/10/2016	Status report for vendor
6/13/2016	Project Status Meeting
6/17/2016	Status report from vendor.
6/20/2016	Project Status Meeting
6/24/2016	Status report for vendor
6/27/2016	Project Status Meeting
6/30/2016	Monthly deliverable REPORT DUE

2.4 Project Milestones

Estimated Dates	Milestone
3/7/2016	Submit DBITS application to DAS
4/21/2016	DAS issues DBITS to select vendors
5/5/2016	MCD receives vendors' submissions
5/6/2016	Preliminary review of submissions is completed.
5/13/2016	Vendor selection completed
5/20/2016	Contract awarded
6/1/2016	Project Kick-Off Meeting with MCD & Vendor
6/1/2016	Work begins
6/6/2016	Data Collection begins
7/15/2016	Preliminary draft of findings/recommendations submitted to MCD
8/15/2016	Finalized draft of findings/recommendations submitted to MCD Items include but limited to: <ul style="list-style-type: none"> • Review of the ODM PMO customer definitions, their needs, expectations and measurable success criteria • Review of the various ODM PMO processes, staffing and methods; measuring how ODM's customer needs, expectations and success criteria are currently being met

	<ul style="list-style-type: none"> • Review of other state agencies and like insurance organizations PMO best practices and how the adoption of these practices may meet ODM's customer needs, expectations and fulfill their success criteria • Review of the current industry standard models for PMO(s) (Portfolio Management Office, Program Management Office(s), Project Management Office(s)) and how the adoption of each may meet ODM's customer needs, expectations and fulfill their success criteria • Review of current industry standard PMO Governance models and how each may meet ODM's customer needs, expectations and fulfill their success criteria • Review of ODM specific PMO organizational structural change options within which to execute project, program and portfolio management and how if adopted each would meet ODM's customer needs, expectations and fulfill their success criteria • Recommendation for ODM's PMO(s) structure, governance and decisions making authority and how if adopted will meet ODM's customer needs, expectations and fulfill their success criteria • Recommendation for ODM executive and management role decision-making authority and how this authority enables ODM to meet it's customer needs, expectations and fulfill their success criteria • Best practices from other organizations • Recommendations on the type of PMO(s) (Portfolio Management Office, Program Management Office(s), Project Management Office(s)) model should be implemented • Recommendations for staffing levels including staff types, roles, education, certifications, position descriptions and current industry standards; showing how these recommendations if followed meet ODM's customer needs, expectations and fulfill their success criteria • Recommendations of project management and requirements tracking software and how integration with systems such as ALPS, ARTS, OAKS and others meets ODM's customer needs, expectations and fulfills their success criteria <p>Recommendations for and complete documented examples of processes, procedures, forms, templates, gate review and decision memorialization documentation for all PMO processes aligned with the Medicaid Information Technology Architecture (MITA) and how if used meet ODM's customer needs, expectations and fulfills their success criteria</p>
9/1/2016	Finalize recommendations
9/5/2016	Assist ODM with the implementation of recommendations
2.5	<p>Contractor's Work Effort Requirement</p> <p>The Contractor's full-time regular employees must perform at least 80% of the effort required to complete the Work. The Contractor may use its personnel or subcontractor personnel to meet the remaining 20 % of the effort.</p>
2.6	<p>Ohio Certified MBE Set-Aside Requirement</p> <p>This SOW Solicitation requires a 20% Set-Aside for Ohio Certified MBE companies.</p>

Section 3: Scope of Work

3.1 Description of Scope of Work

This project is designed to assist ODM with increased project management customer satisfaction and effectiveness. The project consists of defining the Medicaid PMO customers, assessing the effectiveness of the current ODM PMO(s), surveying other agencies and comparable industry leaders' PMO approaches, developing an ODM standard project, portfolio management and governance methodology and accomplishing the necessary organizational changes to successfully meet customer expectations.

The suggested phases are as follows:

1. **Assessment:** Observe the various ODM PMO and related business partners including other state agencies and like industry partners. Conduct a detailed assessment of the ODM PMO maturity and effectiveness and perform an industry best practice review as it relates to enabling the success of ODM's PMO.
 - Document a clear definition of the ODM's PMO customers, their needs, expectations and measurable success criteria
 - Assess the various ODM PMO processes, staffing and methods; measuring how ODM's customer needs, expectations and success criteria are currently being met
 - Review other state agencies and like insurance organizations PMO best practices and review how the adoption of these practices may meet ODM's customer needs, expectations and fulfill their success criteria
 - Review of the current industry standard models for PMO(s) (Portfolio Management Office, Program Management Office(s), Project Management Office(s)) and how the adoption of each may meet ODM's customer needs, expectations and fulfill their success criteria
 - Review the current industry standard and other state agency or insurance industry partner's PMO Governance models and how if adopted may enable ODM to meet its customer needs, expectations and fulfill their success criteria
 - Review of ODM specific PMO organizational structural change options within which to execute project, program and portfolio management and how if adopted each would meet ODM's customer needs, expectations and fulfill their success criteria
2. **Recommendation:** Based on the completed observations and assessment, provide ODM with a series of recommendations for improving the PMO(s) effectiveness and show how if adopted they will meet ODM's customer needs, expectations and fulfill their success criteria. These recommendations should include but not be limited to:
 - ODM's PMO(s) structure, governance and decisions making authority
 - ODM's executive and management roles and decision-making authority
 - Staffing levels including staff types, roles, education, certifications, position descriptions and current industry and state standards
 - Project management and requirements tracking software including the benefits of integration with state systems such as ALPS, ARTS, OAKS and others
 - Develop ODM specific examples of processes, procedures, forms, templates, gate review and decision memorialization documentation for all PMO processes aligned with the Medicaid Information Technology Architecture (MITA)
 - Develop or refine ODM specific processes for:
 - project or initiative initiation
 - project or initiative prioritization
 - fact-based data driven decision-making
 - option vetting
 - articulating risk impacts and mitigation strategies
 - conflict resolution
 - decision confirmation and capture
 - reporting and communication process

Section 3: Scope of Work

- MITA Assessments
 - others as defined or discovered during engagement
 - Best practices from other state or industry partner organizations
 - Recommendations on the type of PMO(s) model(s) should be implemented
3. **Implementation:** Assist ODM with the necessary organizational, and process change to further refine, implement and adopt the recommendations.
- Further refine standard templates for team members and stakeholders to use and implement a management process for the creation, storage, search and reuse of templates and the retention of project documentation records
 - Recommend, implement and train on standard tools and processes for use across all projects, taking into account various project sizes and complexities
 - Develop, implement and train ODM executive and managerial leadership on a near real-time dashboard targeted for executives to determine the health of the project portfolio and the status of mission-critical projects
 - Make recommendations for and implement early indicators when projects need more investment or resources
 - Make recommendations on criteria to apply when projects need to be delayed, paused, or killed
4. **Coaching/Mentoring:** Once implementation is complete, provide coaching/mentoring to ensure the PMO(s) is/are setup and running and recommendations are being followed.
- Coach ODM in project management processes, methods (including Agile), and best practices to accelerate the effectiveness of major change initiatives that affect the entire organization
 - Pilot a new initiative working side-by-side with one or more ODM project managers to apply standard project management practices in a consistent manner
 - Review the status of projects in the portfolio and make recommendations for improved execution through the coaching and mentoring of project managers
 - Identify risks early that could potentially negatively affect the project, and develop mitigation plans
 - Conduct project health checks to identify issues in a timely manner and assist team members in taking appropriate corrective actions when necessary
 - Foster collaborative working relationships and develop a community of project management practitioners within ODM

3.2 Assumptions and Constraints

Assumptions	This will be a new contract and new contracting opportunity, no previous contracts have been awarded for this type of work.
	ODM wants an external perspective to provide best practices and as such, in-house efforts are not appropriate for this effort.
Constraints	N/A

3.3 Detailed Description of Deliverables

- Deliverables must be provided on the dates specified. Any changes to the delivery date must have prior approval (in writing) by the Agency contract manager or designate.
- All deliverables must be submitted in a format approved by the Agency’s contract manager.
- All deliverables must have acceptance criteria established and a time period for testing or acceptance.
- If the deliverable cannot be provided within the scheduled time frame, the Contractor is required to contact the Agency contract manager in writing with a reason for the delay and the proposed revised schedule. The request for a revised schedule must include the impact on related tasks and the overall project.
- A request for a revised schedule must be reviewed and approved by the Agency contract manager before placed in effect.
- The Agency will complete a review of each submitted deliverable within specified working days of the date of receipt.
- A 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.

Deliverable Name	Deliverable Description
<p style="text-align: center;">PMO Assessment</p>	<p>Observe the various ODM PMO and related business partners including other state agencies and like industry partners. Conduct a detailed assessment of the ODM PMO maturity and effectiveness and perform an industry best practice review as it relates to enabling the success of ODM’s PMO.</p> <ul style="list-style-type: none"> • Document a clear definition of the ODM’s PMO customers, their needs, expectations and measurable success criteria • Assess the various ODM PMO processes, staffing and methods; measuring how ODM’s customer needs, expectations and success criteria are currently being met • Review other state agencies and like insurance organizations PMO best practices and review how the adoption of these practices may meet ODM’s customer needs, expectations and fulfill their success criteria • Review of the current industry standard models for PMO(s) (Portfolio Management Office, Program Management Office(s), Project Management Office(s)) and how the adoption of each may meet ODM’s customer needs, expectations and fulfill their success criteria • Review the current industry standard and other state agency or insurance industry partner’s PMO Governance models and how if adopted may enable ODM to meet its customer needs, expectations and fulfill their success criteria <p>Review of ODM specific PMO organizational structural change options within which to execute project, program and portfolio management and how if adopted each would meet ODM’s customer needs, expectations and fulfill their success criteria.</p>
<p style="text-align: center;">Recommendation</p>	<p>Based on the completed observations and assessment, provide ODM with a series of recommendations for improving the PMO(s) effectiveness and show how if adopted they will meet ODM’s customer needs, expectations and fulfill their success criteria. These recommendations should include but not be limited to:</p> <ul style="list-style-type: none"> • ODM’s PMO(s) structure, governance and decisions making authority • ODM’s executive and management roles and decision-making authority

Deliverable Name	Deliverable Description
	<ul style="list-style-type: none"> • Staffing levels including staff types, roles, education, certifications, position descriptions and current industry and state standards • Project management and requirements tracking software including the benefits of integration with state systems such as ALPS, ARTS, OAKS and others • Develop ODM specific examples of processes, procedures, forms, templates, gate review and decision memorialization documentation for all PMO processes aligned with the Medicaid Information Technology Architecture (MITA) • Develop or refine ODM specific processes for: <ul style="list-style-type: none"> ○ project or initiative initiation ○ project or initiative prioritization ○ fact-based data driven decision-making ○ option vetting ○ articulating risk impacts and mitigation strategies ○ conflict resolution ○ decision confirmation and capture ○ reporting and communication process ○ MITA Assessments ○ others as defined or discovered during engagement • Best practices from other state or industry partner organizations
Implementation	<p>Assist ODM with the necessary organizational, and process change to further refine, implement and adopt the recommendations.</p> <ul style="list-style-type: none"> • Further refine standard templates for team members and stakeholders to use and implement a management process for the creation, storage, search and reuse of templates and the retention of project documentation records • Recommend, implement and train on standard tools and processes for use across all projects, taking into account various project sizes and complexities • Develop, implement and train ODM executive and managerial leadership on a near real-time dashboard targeted for executives to determine the health of the project portfolio and the status of mission-critical projects • Make recommendations for and implement early indicators when projects need more investment or resources <ul style="list-style-type: none"> • Make recommendations on criteria to apply when projects need to be delayed, paused, or killed

Deliverable Name	Deliverable Description
Products	<ul style="list-style-type: none"> • Standard Operating Procedure(s) • Templates • Forms • Dashboards • Decision Matrixes
Coaching/Mentoring	<p>Provide coaching/mentoring to ensure the PMO(s) is/are setup and running and recommendations are being followed by Project Managers, Managers and Executives.</p> <ul style="list-style-type: none"> • Coach ODM in project management processes, methods (including Agile), and best practices to accelerate the effectiveness of major change initiatives that affect the entire organization • Pilot a new initiative working side-by-side with one or more ODM project managers to apply standard project management practices in a consistent manner • Facilitate executive, managerial and project management review of the status of projects in the portfolio and make recommendations for improved execution through the coaching and mentoring of project managers, managers and executives • Assist project managers, managers and executives in identifying risks early that could potentially negatively affect the project, and develop mitigation plans • Conduct and model project health checks, gate reviews and spot checks to identify issues in a timely manner and train managers in assisting team members in identifying issues and taking appropriate corrective actions • Fill in for an extended period during an unexpected absence of a project or program manager • Foster collaborative working relationships and develop a community of project management practitioners within ODM

Deliverable Name	Due Date (If applicable)	Payment Eligible? Yes/No	Acceptance Criteria
PMO Assessment	T+60 days	Yes	ODM must be presented a Microsoft Office document and PowerPoint presentation. A formal presentation shall be held where a thorough review of the findings is to be delivered to ODM. The document and presentation must include a detailed assessment of the ODM PMO

Deliverable Name	Due Date (If applicable)	Payment Eligible? Yes/No	Acceptance Criteria
			<p>maturity and effectiveness and an industry best practice review as it relates to enabling the success of ODM's PMO. The following topics must be covered in the document and presentation:</p> <ul style="list-style-type: none"> • A clear definition of the ODM's PMO customers, their needs, expectations and measurable success criteria • Assessment of the various ODM PMO processes, staffing and methods; measuring how ODM's customer needs, expectations and success criteria are currently being met • A review of other state agencies and like insurance organizations PMO best practices and how the adoption of these practices may meet ODM's customer needs, expectations and fulfill their success criteria • A review of the current industry standard models for PMO(s) (Portfolio Management Office, Program Management Office(s), Project Management Office(s)) and how the adoption of each may meet ODM's customer needs, expectations and fulfill their success criteria • A review the current industry standard and other state agency or insurance industry partner's PMO Governance models and how if adopted may enable ODM to meet its customer needs, expectations and fulfill their success criteria • A review of ODM specific PMO organizational structural change options within which to execute project, program and portfolio management and how if adopted each would meet ODM's customer needs, expectations and fulfill their success criteria

Deliverable Name	Due Date (If applicable)	Payment Eligible? Yes/No	Acceptance Criteria
Recommendation	T+120 days	Yes	<p>ODM must be presented one or more Microsoft Office documents, Visio diagrams and PowerPoint presentations. A formal presentation shall be held where a thorough review of all recommendations and documented processes, forms and documentation templates shall be delivered to ODM. The documents and presentation(s) must include a detailed series of written recommendations for improving the PMO(s) effectiveness and show how if adopted they will meet ODM's customer needs, expectations and fulfill their success criteria. These recommendations should include but not be limited to:</p> <ul style="list-style-type: none"> • ODM's PMO(s) structure, governance and decisions making authority • ODM's executive and management roles and decision-making authority • Staffing levels including staff types, roles, education, certifications, position descriptions and current industry and state standards • Project management and requirements tracking software including the benefits of integration with state systems such as ALPS, ARTS, OAKS and others • ODM specific examples of processes, procedures, forms, templates, gate review and decision memorialization documentation for all PMO processes aligned with the Medicaid Information Technology Architecture (MITA) • Developed or refined ODM specific processes for: <ul style="list-style-type: none"> ○ project or initiative initiation

Deliverable Name	Due Date (If applicable)	Payment Eligible? Yes/No	Acceptance Criteria
			<ul style="list-style-type: none"> ○ project or initiative prioritization ○ fact-based data driven decision-making ○ option vetting ○ articulating risk impacts and mitigation strategies ○ conflict resolution ○ decision confirmation and capture ○ reporting and communication process ○ MITA Assessments ○ others as defined or discovered during engagement • Best practices from other state or industry partner organizations
Implementation	T+180 days	Yes	Start implementing recommendations, best practices, processes, forms, templates, SOP.
Coaching/Mentoring	T+270 days	Yes	ODM must be provided with hands on interactive coaching/mentoring to ensure the PMO(s) is/are setup and running and recommendations are being followed by Project Managers, Managers and Executives. Multiple interactive coaching and mentoring sessions shall be held with individuals and groups. Training materials to facilitate coaching and mentoring sessions shall be developed using Microsoft Office tools. Coaching and mentoring materials shall be provided to ODM in electronic, original, ODM reproducible form. Materials shall be presented at times of coaching and mentoring and shall be made available for ODM's unlimited future orientation and coaching use.

Deliverable Name	Due Date (If applicable)	Payment Eligible? Yes/No	Acceptance Criteria
			<ul style="list-style-type: none"> • Coach ODM in project management processes, methods (including Agile), and best practices to accelerate the effectiveness of major change initiatives that affect the entire organization • Pilot a new initiative working side-by-side with one or more ODM project managers to apply standard project management practices in a consistent manner • Facilitate executive, managerial and project management review of the status of projects in the portfolio and make recommendations for improved execution through the coaching and mentoring of project managers, managers and executives • Assist project managers, managers and executives in identifying risks early that could potentially negatively affect the project, and develop mitigation plans • Conduct and model project health checks, gate reviews and spot checks to identify issues in a timely manner and train managers in assisting team members in identifying issues and taking appropriate corrective actions • Fill in for an extended period during an unexpected absence of a project or program manager • Foster collaborative working relationships and develop a community of project management practitioners within ODM

3.5 Roles and Responsibilities

Project or Management Activity/Responsibility Description	Contractor	Agency
Work collaboratively with and in support of ODM staff and contractors to provide support in support of this project as described in the Scope of Work section of this document	X	X
Work with ODM Staff and others to define and document high-level business processes and high-level and detailed business requirements	X	
When directed, produce and review (this is not an exclusive list): Project documentation such as project plan, WBS, Gantt charts, schedules, risk assessments, mitigation plans, tracking of timelines, Ad Hoc reporting, work tasks, business requirements, workflows, table of organization	X	
Communicate and coordinate with ODM regarding all scheduled project activities and events to ensure successful completion	X	
Facilitate and participate in approved project planning, request for change documentation, business requirements, testing, and implementation for projects	X	
Provide weekly and accurate status reports including identification and documentation of issues and risks following accepted project standards and actively engage in issue resolutions activities	X	

3.6 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 State may reject any SOW Response that proposes to do any work or make State data available outside the United States.

3.7 Resource Requirements

ODM will provide cubicle space with use of terminals, printers, and conference rooms.

Section 4: Deliverables Management

4.1 Submission/Format

PM Artifact/Project Work Product	Submission	Format
Assessment Artifacts	By vendor	Microsoft Office Suite
Revised policies, procedures, templates and recommendations	By vendor	Microsoft Office Suite
PMO Governance Policies Procedures and Implementation Criteria	By vendor	Microsoft Office Suite

Risk assessment	By vendor	Microsoft Office Suite
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4.2 Reports and Meetings

The Contractor is required to provide the Agency contract manager with **WEEKLY** written progress reports of this project. These are due to the Agency contract manager by the close of business on **FRIDAY** each week throughout the life of the project.

- The progress reports shall cover all work performed and completed during the week for which the progress report is provided and shall present the work to be performed during the subsequent week.
- The progress report shall identify any problems encountered or still outstanding with an explanation of the cause and resolution of the problem or how the problem will be resolved.
- The Contractor will be responsible for conducting weekly status meetings with the Agency contract manager. The meetings will be held on **MONDAY** at a time and place so designated by the Agency contract manager – unless revised by the Agency contract manager. The meetings can be in person or over the phone at the discretion of the Agency contract manager.

4.3 Period of Performance

Describe period of performance in relation to expected project duration.

4.4 Performance Expectations

This section sets forth the performance specifications for the Service Level Agreements (SLA) to be established between the Contractor and State. Most individual service levels are linked to “Fee at Risk” due to the State to incent Contractor performance.

The Service Levels contained herein are Service Levels this SOW Solicitation. Both the State 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.

Service Level Agreement:

The Contractor shall meet the deadlines established in the project timeline. Failure to meet these deadlines may lead to an assessment of \$1000 per day. The work product should be free of errors and defects. If more than 10 errors are found in each deliverable, there may be an assessment of \$500 per deliverable with this amount of errors.

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 as follows:

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

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 state 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 State.

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

4.5 State Staffing Plan

Provide staffing plan for state project team and other applicable stakeholders. Describe the state staff that the Contractor will primarily interact with during the term of the project.

Staff/Stakeholder Name	Project Role	Percent Allocated
Jennifer Demory – ODM Chief of Staff	Project Co-Sponsor	50%
Eric Skomra – ODM CIO	Project Co-Sponsor	50%
Brian Smith	Project Manager Co-Lead	50%
Joseph Pichert	Project Manager Co-Lead	50%

Section 5: SOW Response Submission Requirements

5.1 Response Format, Content Requirements

Describe format and content requirements. Include a bullet listing of items to be included within the response.

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

Each Proposal must contain the following:

- Cover Letter
- Pre-Qualified Contractor Experience Requirements
- Subcontractors Documentation
- Assumptions
- Payment Address
- Staffing plan, personnel resumes, time commitment, organizational chart
- Contingency Plan
- Project Plan
- Project Schedule (WBS using MS Project or compatible)
- Communication Plan
- Risk Management Plan
- Quality Management Plan
- Fee Structure including Estimated Work Effort for each Task/Deliverable
- Rate Card

Include the following:

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 Pre-Qualified Contractor;
- c. Must include a statement regarding the Pre-Qualified Contractor's legal structure (e.g. an Ohio corporation), Federal tax identification number, and principal place of business; please list 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, e-mail, phone number, and fax number of a contact person who has the authority to answer questions regarding the Proposal.

2. Pre-Qualified Contractors Experience Requirements

- a. Each proposal must include a brief executive summary of the services the Pre-Qualified Contractor proposes to provide and one representative sample of previously completed projects as it relates to this proposal (e.g. detailed requirements documents, analysis);
- b. Each proposal must describe the Pre-Qualified Contractor's experience, capability, and capacity to provide Project Management and optional Solicitation Assistance. Provide specific detailed information demonstrating experience similar in nature to the type of work described in this SOW for each of the resources identified in Section 5.2.
- c. **Mandatory Requirements:** The Pre-Qualified Contractor must possess knowledge of following:

Offeror must demonstrate experience in conducting detailed assessments of the maturity and effectiveness of the PMO for 5 successful projects. Offeror must demonstrate experience specific to setting up and maintaining a PMO for an agencies/companies with greater than 500 employees.

Offeror must demonstrate 24 months experience in issuing recommendations pertaining to the following: PMO Governance; define and implement a structure within which to execute program management; and administration.

Offeror must demonstrate how it recommended specific decision-making authority to each executive and management role and best practices from other organizations.

Offeror must demonstrate 24 months experience in implementation of recommendations. Offeror must demonstrate how it has assisted with the development of best practices, processes, forms, templates, and Standard Operating Procedures, etc.

Offeror must demonstrate 24 months experience in Coaching & Mentoring. Offeror must demonstrate a proven track record from providing the recommendation to ensuring success with the project.

Established Competitive Partnership with Ohio Certified MBE for 20% of the work under this contract.

3. Subcontractor Documentation:

a. For each proposed Subcontractor, the Contractor must attach a letter from the subcontractor, signed by someone authorized to legally bind the subcontractor, with the following included in the letter:

- i. The Subcontractor's legal status, federal tax identification number, D-U-N-S number if applicable, and principal place of business address;
- ii. 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;
- iii. 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);
- iv. 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 5.2;
- v. A commitment to do the work if the Contractor is selected; and
- vi. A statement that the Subcontractor has read and understood the RFP and will comply with the requirements of the RFP.

4. Assumptions: The Pre-Qualified Contractor must list all assumptions the Pre-Qualified Contractor made in preparing the Proposal. If any assumption is unacceptable to the State, the State may at its sole discretion request that the Pre-Qualified Contractor remove the assumption or choose to reject the Proposal. No assumptions may be included regarding the outcomes of negotiation, terms and conditions, or requirements. Assumptions should be provided as part of the Pre-Qualified Contractor 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 Pre-Qualified Contractor should not include assumptions elsewhere in their response.

5. Payment Address: The Pre-Qualified Contractor must give the address to which the State should send payments under the Contract.

6. Staffing plan, personnel resumes, time commitment, organizational chart

Identify Contractor and sub-contractor staff and time commitment. Identify hourly rates for personnel, as applicable.

Include Contractor and sub-contractor resumes for each resource identified and organizational chart for entire team.

Contractor Name	Role	Contractor or Sub-contractor?	No. Hours	Hourly Rate

7. Contingency Plan

A contingency plan that shows the ability to add more staff with the appropriate subject matter expertise if needed to ensure meeting the Project's due date(s).

8. Project Plan

Identify and describe the plan to produce effective documents and complete the Scope of Work as defined in this solicitation in Section 3. Describe the primary tasks, how long each task will take, and when each task will be completed in order to meet the final deadline.

9. Project Schedule (WBS using MS Project or compatible)

Describe the Project Schedule including planning, defining goals, including milestones, and time for writing, editing and revising. Using MS Project or compatible, create a deliverable-oriented grouping of project elements that organizes and defines the total work scope of the project with each descending level representing an increasingly detailed definition of the project work.

10. Communication Plan

Describe the methods to be used to gather and store various types of information and to disseminate the information, updates, and corrections to previously distributed material. Identify to whom the information will flow and what methods will be used for the distribution. Include format, content, level of detail, and conventions to be used. Provide methods for accessing information between scheduled communications.

11. Risk Management Plan

Describe the Risk Management Plan requirements 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 plan for keeping people informed about those risks throughout the project.

12. Quality Management Plan

Describe your quality policies, procedures, and standards relevant to the project for both project deliverables and project processes. Show examples of the Quality Assurance and Quality Control for documentation, processes, and procedures.

13. Fee Structure including Estimated Work Effort for each Deliverable

Pre-qualified Contractors must submit a Rate Card that includes hourly rates for all services pertaining to the Scope of Work in this solicitation, including but not limited to those listed in Section 5.2. Enter the Rate Card information in this Section.

Deliverable Name	Total Estimated Work Effort (Hours)	Not-to-Exceed Fixed Price for Deliverable
PMO Assessment		\$
Recommendation		\$
Implementation		\$
Products		\$
Coaching/Mentoring		\$

Deliverable Name	Total Estimated Work Effort (Hours)	Not-to-Exceed Fixed Price for Deliverable
	Total Cost for all Deliverables	

14. Rate Card

Describe submission and format requirements for Pre-Qualified Contractors to submit a Rate Card, as applicable. The primary purpose of obtaining this Rate Card information is to establish baseline hourly rates in the event that change orders are necessary. The DBITS contract is not intended to be used for hourly based time and materials work. (NOTE – Section 5.2 collects rate information for named resources)

Section 6: SOW Evaluation Criteria

Mandatory Requirements	Accept	Reject
Offeror must demonstrate experience in conducting detailed assessments of the maturity and effectiveness of the PMO for 5 successful projects. Offeror must demonstrate experience specific to setting up and maintaining a PMO for an agencies/companies with greater than 500 employees.		
Offeror must demonstrate 24 months experience in issuing recommendations pertaining to the following: PMO Governance; Define and implement a structure within which to execute program management; and administration. Offeror must demonstrate how it recommended specific decision-making authority to each executive and management role and best practices from other organizations.		
Offeror must demonstrate 24 months experience in implementation of recommendations. Offeror must demonstrate how it has assisted with the development of best practices, processes, forms, templates, and Standard Operating Procedures, etc.		
Offeror must demonstrate 24 months experience in Coaching & Mentoring. Offeror must demonstrate a proven track record from providing the recommendation to ensuring success with the project.		
Established Competitive Partnership with Ohio Certified MBE for 20% of the work under this contract.		

Scored Criteria. In the technical evaluation phase, the State will rate the technical merits of the Proposals based on the following requirements and the weight assigned to each requirement:

Scored Criteria	Weight	Does Not Meet	Partially Meets	Meets	Exceeds
Offeror must demonstrate experience in conducting detailed assessments of the maturity and effectiveness of the PMO for 5 successful projects. Offeror must demonstrate experience specific to setting up and maintaining a PMO for an agencies/companies with greater than 500 employees.		Rejected	2	5	7
Offeror must demonstrate 24 months experience in issuing recommendations pertaining to the following: PMO Governance; Define and implement a structure within which to execute program management; and administration. Offeror must demonstrate how it recommended specific decision-making authority to each executive and management role and best practices from other organizations.		0	2	5	7
Offeror must demonstrate 24 months experience in implementation of recommendations. Offeror must demonstrate how it has assisted with the development of best practices, processes, forms, templates, and Standard Operating Procedures, etc.		0	2	5	7
Offeror must demonstrate 24 months experience in Coaching & Mentoring. Offeror must demonstrate a proven track record from providing the recommendation to ensuring success with the project.		0	2	5	7

Criteria Percentage

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 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 Technical Proposal Points/Highest Number of Technical Proposal Points Obtained) x 800

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 Purposes/Offeror's Total Cost for Evaluation Purposes) x 200

Total Points Score: The total points score is calculated using the following formula:

Total Points = Technical Proposal Points + Cost Summary Points

Section 7: SOW Solicitation Calendar of Events

Firm Dates

<i>SOW Solicitation Released to Pre-qualified Contractors</i>	<i>April 21, 2016</i>
<i>Inquiry Period Begins</i>	<i>April 21, 2016</i>
<i>Inquiry Period Ends</i>	<i>April 28, 2016</i>
<i>Proposal Response Due Date</i>	<i>May 5, 2016 at 1:00 PM</i>

Location of submission:

**Office of Contracts and Procurement
Ohio Department of Medicaid
50 West Town Street
Columbus, Ohio 43215
ATTN: RFP/RLB Unit**

Anticipated Dates

<i>Estimated Date for Selection of Awarded Contractor</i>	<i>May 2016</i>
<i>Estimated Commencement Date of Work</i>	<i>May 2016</i>

All times listed are Eastern Standard Time (EST).

Section 8: Inquiry Process

Pre-Qualified Contractors may make inquiries regarding this SOW Solicitation anytime during the inquiry period listed in the Calendar of Events. To make an inquiry, Pre-Qualified Contractors must use the following process:

- Access the State's Procurement Website at <http://procure.ohio.gov/>;
- From the Quick Links menu on the right, select "**Bid Opportunities Search**";
- In the "**Document/Bid Number**" field, enter the RFP number found on the first page of this RFP (the RFP number begins with zero followed by the letter "A");
- Select "**Request for Proposals**" from the Opportunity Type dropdown;
- Click the "Search" button;
- On the Opportunity Search Results page, click on the hyperlinked Bid Number;
- On the Opportunity Details page, click the "Submit Inquiry" button;
- On the document inquiry page, complete the required "Personal Information" section by providing:
 - First and last name of the prospective offeror's representative who is responsible for the inquiry,
 - Name of the prospective offeror,
 - Representative's business phone number, and
 - Representative's email address;

- Type the inquiry in the space provided including:
 - A reference to the relevant part of this RFP,
 - The heading for the provision under question, and
 - The page number of the RFP where the provision can be found; and
- Enter the Confirmation Number at the bottom of the page
- Click the “Submit” button.

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

Pre-Qualified Contractors may view inquiries and responses on the State’s Procurement Website by using the “Find It Fast” feature described above and by clicking the “View Q & A” button on the document information page.

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

The State does not consider questions asked during the inquiry period through the inquiry process as exceptions to the terms and conditions of this RFP.

Section 9: Submission Instructions & Location

*Each Pre-Qualified Contractor must submit **five (5) (one signed and four (4) paper copies** complete, sealed and signed of its Proposal Response and each submission must be clearly marked “**Project Management Office (PMO) Setup Initiative**” on the outside of its package along with Pre-Qualified Contractor’s name. It is the Offeror’s sole responsibility to ensure that all copies and all formats of the technical proposal are identical. Any pages or documents omitted from any or all copies can negatively affect the vendor’s score and possibly result in disqualification. In the event of any discrepancies or variations between copies,*

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 Pre-Qualified Contractor in responding to this SOW Solicitation, 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 submissions regardless of the cause for the delay. The State may also reject any submissions that it believes is not in its interest to accept and may decide not to do business with any of the Pre-Qualified Contractors responding to this SOW Solicitation.

Proposal Responses MUST be submitted to the State Agency’s Procurement Representative:

Office of Contracts and Procurement

Ohio Department of Medicaid

50 West Town Street

Columbus, Ohio 43215

ATTN: RFP/RLB Unit

Proprietary information

All Proposal Responses 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 Proposal Response or supporting materials because the State will have the right to use any materials or ideas submitted in any quotation without compensation to the Pre-Qualified Contractor. Additionally, all Proposal Response submissions will be open to the public after the contract has been awarded.

The State may reject any Proposal if the Pre-Qualified Contractor takes exception to the terms and conditions of the Contract.

Waiver of Defects

The State has the right to waive any defects in any quotation or in the submission process followed by a Pre-Qualified Contractor. 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 Pre-Qualified Contractors.

Rejection of Submissions

The State may reject any submissions 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 State will reject any responses from companies not pre-qualified 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 10: Limitation of Liability

(Identification of Limitation of Liability applicable to the specific SOW Solicitation. Unless otherwise stated in this section of the SOW Solicitation, the Limitation of Liability will be as described in Attachment Four, Part Four of the Contract General Terms and Conditions.

Template

(Offerors can duplicate this form as necessary.)

Offeror must demonstrate how it has assisted with the development of best practices, processes, forms, templates, and Standard Operating Procedures, etc.:

(Offerors can duplicate this form as necessary.)

Offeror must demonstrate a proven track record from providing the recommendation to ensuring success with the project.

(Offerors can duplicate this form as necessary.)

**ATTACHMENT ONE
OFFEROR PROFILE
OFFEROR MANDATORY REQUIREMENTS**

MANDATORY REQUIREMENT #5:

Established Competitive Partnership with Ohio Certified Minority Business Enterprise (MBE) for 20% of the work under this contract.

Describe the Scope of Work to be performed by the Ohio certified Minority Business Enterprise. Also, attach a copy of the MBE's current certification. (The MBE must maintain its Ohio certification through the duration of the Project.)