



Department of Administrative Services on behalf of the Environmental Protection Agency (EPA):

EPA External Website Re-platforming

InnovateOhio Platform Statement of Work Solicitation DXEPA-20-01-001

This opportunity is being released to InnovateOhio Platform 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 will 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

Deloitte Consulting

g2o

Timeline:

SOW solicitation released to prequalified Contractors 01/22/2020

Inquiry period begins 01/22/2020

Inquiry period ends at 8:00 a.m. EST 02/05/2020

Proposal response due date by 1:00 p.m. EST 02/10/2020

Statement of Work Solicitation

Contents

| | |
|-----------------------------------------------------------|----|
| Section 1: Purpose | 2 |
| Section 2: Background Information | 2 |
| 2.1 Agency Information | 2 |
| 2.2 Project Information | 3 |
| 2.3 Project Schedule..... | 4 |
| 2.4 Project Milestones | 5 |
| 2.5 Contractor’s Work Effort Requirement..... | 5 |
| Section 3: Scope of Work..... | 5 |
| 3.1 Scope Description..... | 5 |
| 3.2 Requirements | 6 |
| 3.3 Deliverable Description | 7 |
| Section 4: Deliverables Management..... | 11 |
| 4.1 Submission Format..... | 11 |
| 4.2 Reports and Meetings..... | 11 |
| 4.3 Period of Performance..... | 11 |
| 4.4 Performance Expectations..... | 11 |
| 4.5 State Staffing Plan | 14 |
| Section 5: Proposal Response Submission Requirements..... | 14 |
| 5.1 Response Format and Content Requirements..... | 14 |
| Section 6: Proposal Evaluation Criteria | 19 |
| 6.1 Offeror Requirements | 19 |
| 6.2 Scored Requirements | 19 |
| 6.3 Price Performance Formula..... | 20 |

| | |
|-----------------------------------------------------|----|
| Section 7: Solicitation Calendar of Events | 21 |
| 7.1 Firm Dates..... | 21 |
| 7.2 Anticipated Dates | 21 |
| Section 8: Inquiry Process | 22 |
| 8.1 Submitting an Inquiry | 22 |
| 8.2 Inquiry Response and Viewing | 22 |
| Section 9: Submission Instructions & Location | 23 |
| 9.1 Submission Instructions | 23 |
| 9.2 Submission Location..... | 23 |
| 9.3 Proprietary Information..... | 23 |

Section 1: Purpose

The purpose of this project Statement of Work (SOW) is to provide the Environmental Protection Agency (EPA) 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. Contractor agrees that it is in compliance with contract #0A1216 and will comply with this SOW.

Section 2: Background Information

2.1 Agency Information

2.1.1 Agency or Program Name

Environmental Protection Agency

2.1.2 Contact Information

Name: Cathryn Allen **Phone:** 614-728-0031

Email: Cathryn.allen@epa.ohio.gov

Address:

Ohio EPA
Information Technology Services – Attn: Nick Haritos
50 W. Town St., Suite 700
Columbus, OH 43215

2.2 Project Information

2.2.1 Project Name

EPA's Internet Migration to IOP Platform

2.2.2 Project Background & Objectives

The Environmental Protection Agency is seeking to secure a website development contractor to onboard a website to IOP's Portal Builder.

The selected Contractor will be responsible for:

- Standing up the Agency's new website framework;
- Training Agency site administrators and content authors / owners who will be responsible for editing and updating the website, and for creating new pages on the site; and
- Executing organizational change management activities such as working with Agency staff who add/and maintain content to adjust to the new solution and processes and recommendations for helping internal and external end users adjust to the differences.

Selected Contractor must utilize IOP's 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 Ohio Department of Administrative Services (DAS), IOP staff to ensure the new website is consistent with the IOP platform and guidelines.

2.2.3 Expected Project Duration

This project build must be completed by 12/31/2020 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.

2.2.4 Deliverable Expectations

Deliverables must be provided according to the approved and baselined project plan established during the first week of the project. Any changes to the timeline must have prior written approval by the Agency Contract Manager or designee.

All deliverables must be submitted in a format approved by the State's Project Manager. All deliverables must have acceptance criteria established and time for testing or acceptance.

If the deliverable cannot be provided within the scheduled timeframe, 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. If the Agency determines a deliverable is no longer needed, they will submit that in writing to the Contractor within 2 weeks.

A request for a revised schedule must be reviewed and approved by the Agency Contract Manager before being placed into effect. The Agency will complete a review of each submitted deliverable within 5 working days of the date of receipt.

2.3 Project Schedule

[Project Schedule Table Exhibit]

| Milestone | Date |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| Earliest project commencement date | 02/29/2020 |
| Project kickoff with EPA and IOP. The kickoff meeting will be held at a location selected by EPA where the 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 the designs and demonstrates the prototypes EPA | 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 and final report | Contractor proposed |

2.4 Project Milestones

[Contractor will propose milestones.]

| Milestone | Date |
|-----------|------|
| | |
| | |
| | |
| | |
| | |

2.5 Contractor's Work Effort Requirement

The Contractor's full-time regular employees must perform 80% of the effort required to complete the work. The work must be completed on site with the State.

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 redesign and deployment effort.

The EPA project consists of designing an intuitive and engaging website to provide information while promoting and marketing services to current and potential permitted entities, public, and other partners.

The EPA website will use these components and will follow IOP Content First Methodology, to create a user-friendly digital framework that enables EPA's audiences to experience an enhanced engagement with the Ohio government Agency:

1. News and events;
2. Resources and alerts;
3. Carousels;
4. Social Media Integrations (Twitter, Facebook);
5. FAQs;
6. Video; and
7. Forms, Tableau Dashboards, GIS/Maps, etc.

At a high level, functionality requirements will include:

- A. Execution of all designs, approaches, and impacts to Agency website, as well as integration and impact coordination with stakeholder and third-party content/application providers;
- B. Adoption of the InnovateOhio Platform Portal Builder to stand up the new website framework;
- C. Mobile Friendly Design - Navigation systems and iconography consistent with user expectations;
- D. Site navigation and structure recommendations based on the InnovateOhio Platform;
- E. Provide for the integration of geolocation-enabled content;
- F. Enable Agency to be able to create and maintain future sites;
- G. Content selection/creation and site requirements-gathering working sessions;
- H. Creating and validating the website framework;
- I. Video streaming and storage must use IOP capabilities;
- J. Forms must use IOP form builder capabilities;
- K. Maps must use IOP capabilities (ESRI/OGRIP);
- L. In-Person Training of EPA staff on creating/updating website pages, sections content and running reports using analytics along with supporting training documentation;
- M. Any new components or changes to current IOP Portal Builder components must be compliant such as mobile device compatible via mobile first implementation via responsive design (responsive); and
- N. Compliance 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 current site(s) and content: <https://epa.ohio.gov/>

3.2 Requirements

3.2.1 *Functional and Technical Requirements*

- A. Research and best practices must be applied and documented as inputs to be used by the State stakeholders for all project decisions and site mission support;
- B. All work must be customer-focused and data-driven in alignment with InnovateOhio and InnovateOhio Platform;

- C. All InnovateOhio Platform hosted content must render on supported browsers in under a second;
- D. Identification and execution of all needed steps must be completed to elevate primary search engine results in support of the mission of epa.ohio.gov;
- E. Content must follow InnovateOhio Platform’s *content-first* methodology;
- F. Organizational change management activities must be executed;
- G. Project status reporting must take place via the InnovateOhio Platform ATLAS (Atlassian) toolset;
- H. Site must be built using responsive web design to support all screen resolutions and device types;
- I. Site must be compatible with multiple browsers including but not limited to Google Chrome, Mozilla Firefox, Internet Explorer, Microsoft Edge, Safari for Apple computers and iPhones and must be compatible with the current version and three previous versions of the browsers; and
- J. All updates required to IOP Portal Builder must be documented in IOP ATLAS.

3.2.2 *Project and Contractor Requirements*

- A. The project must be completed by 12/31/2020 and staff training must be completed by 09/30/2020;
- B. Contractor must have the capacity and ability to provide technical assistance and training to State staff including, but not limited to, the following activities: edit/modify editable forms and templates, update content, and run website analytics reports;
- C. Contractor must be able to adhere to InnovateOhio Platform-hosted solution requirements, including use of IBM Digital Experience portal tools as configured, hosted, and supported by DAS and per the requirements set forth herein;
- D. Contractor is responsible for travel expenses and cannot charge InnovateOhio Platform or State for incurred expenses; and
- E. Develop a Support Model that includes a stabilization period after the “go-live” and details ongoing support services, including production support, application maintenance, and enhancements.

3.3 Deliverable Description

3.3.1 *Detailed Description of Deliverables*

- A. Contractor and State will 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 State Project Manager and InnovateOhio Platform Contract Manager or designee;
- B. Deliverables must be submitted to State Project Manager and InnovateOhio Platform Contract Manager in the InnovateOhio Platform-approved format;

- C. Deliverable acceptance criteria and time period for deliverable testing and acceptance must be established with State Project Manager and InnovateOhio Platform Contract Manager within the first two weeks of project commencement;
- D. If a deliverable cannot be completed per the approved schedule and plan, the Contractor must notify the State Project Manager and InnovateOhio Platform 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. Monies cannot be reallocated; and
- E. Deliverable review will be conducted by the InnovateOhio Platform Contract Manager and EPA designee within 5 working days of deliverable submission.

3.3.2 *Descriptions by Deliverable Name*

| Deliverable Name | Description |
|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Kickoff Meeting | Kickoff meeting will be held at a location and time selected by the State where the Contractor and its staff will be introduced to the Agency and will discuss project requirements and brand guidelines. |
| Project Plan | Includes breakdown of tasks, milestones, deliverables, milestone dates, deliverable dates, owners, and critical path (baselined). Contractor must proactively maintain the baselined and approved project plan throughout the project. |
| Requirements-Gathering Workshops | Documentation of non-functional, functional, and technical requirements. |
| Clickable Prototypes | The Contractor completes the designs and demonstrates the prototypes to State, (documentation of a landing page and approximately four pages is all that is required). |
| Contractor Proposed Deliverable(s) | Contractor to propose deliverables in support of the scope and the combined use of the InnovateOhio Platform and their methodologies: please add these to the response. |
| Communication and Engagement 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. |
| Training EPA Staff | Contractor to propose the number and format of training sessions for the Agency. |
| Fully functional website available for UAT | The final implementation of the website available to a limited number of staff and users to test. Final website shared with focus group to gather feedback. |
| User Acceptance Testing (UAT) Completion | Feedback from both the UAT testers and the final focus group incorporated, and customer approval obtained. |
| Final Project Summary | Contractor is required to submit a final project summary to State and InnovateOhio Platform before completion of hypercare. InnovateOhio Platform will provide the Contractor with a report form template. |

3.3.3 Deliverable Acceptance

| Deliverable Name | Due Date (if applicable) | Payment Eligible? | Acceptance Process |
|--------------------------------------------|-------------------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Kickoff Meeting | TBD | Yes | Kickoff meeting will be held at a location and time selected by EPA. |
| Project Plan | TBD (updated throughout project) | Yes | Approved by State (EPA) Project Manager and InnovateOhio Platform Contract manager. Delivered with ATLAS program management tool (access provided via InnovateOhio Platform). |
| Requirements-Gathering Workshops | TBD | Yes | Documentation of non-functional, functional, and technical requirements. |
| Clickable Design Prototypes | TBD | Yes | Used to present and document the design, information architecture and results of the Contractors and InnovateOhio Platform methodologies. General vision and tone of the new website as documented by a landing page and approximately four pages is all that is required |
| Contractor Proposed Deliverable(s) | TBD | Yes | Prior to execution of the SOW, State and Contractor to agree on all deliverables, payment eligibility, and acceptance process. |
| Communication and Engagement Plan | TBD | Yes | EPA project sponsor(s) and InnovateOhio Platform Contract Manager acceptance. |
| Training EPA Staff | TBD | No | EPA staff receive training on multiple topics including analytics for running reports. Transition Plan to provide necessary knowledge and skills for EPA staff to operate sites without further assistance. |
| Fully functional website available for UAT | TBD | No | Provide test conditions and documented proof that the technical solution delivers the agreed to requirements in a non-production environment. Provide a list of all defects encountered and resolved. Provide action plans to remediate any defects agreed to be delivered during a hyper-care period. |
| User Acceptance Testing (UAT) Completion | TBD | No | Project sponsor(s) and IOP Contract Manager acceptance. |

| | | | |
|-----------------------|--------------------------|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Final Project Summary | TBD | Yes | EPA project sponsor(s) and InnovateOhio Platform Contract Manager acceptance. |
| Subcontractor | Duration of the contract | No | All subcontracts are submitted to EPA Project Manager and InnovateOhio Platform Contract Manager for approval before any agreement is entered into by the Contractor and subcontractor. |

3.3.4 Roles and Responsibilities

| Project Activity Description | Contractor | State/InnovateOhio Platform |
|-----------------------------------------------------|------------|-----------------------------|
| 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 | |
| Communication and engagement plan | X | |
| Final project summary and Agency style guide | X | |
| Review and accept deliverables | | X |

3.3.5 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.

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

3.3.6 Resource Requirements

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

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

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

Contractor must follow the InnovateOhio Platform program management methodology and submit weekly InnovateOhio Platform 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 State'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 InnovateOhio Platform.

4.2 Reports and Meetings

Contractor must conduct weekly status meetings with State Project Manager. State Project Manager will establish meeting date/time/location. Meetings must be held in person.

Contractor must update status within InnovateOhio Platform 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.

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

4.3 Period of Performance

This project is expected to be completed on or Performance is based on the delivery, acceptance and approval of each deliverable.

4.4 Performance Expectations

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

4.4.1 *Fee at Risk*

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

Both the State and 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.

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:

$$\text{Total Not to Exceed Fixed Price (NTEFP) of the SOW} \times 10\% = \text{Total Fee at Risk for the SOW}$$

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

$$\text{Monthly Fee at Risk} = \text{Total Fee at Risk for the SOW} \div \text{Term of the SOW in months}$$

4.4.2 Performance Credit

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 State for the failure of the SLAs. For SLAs measured on a quarterly 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 State'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 State'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 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 10th day of the following month.

| SLA | Performance Evaluated | Non-Conformance Remedy | Frequency of Measurement |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|--------------------------|
| Deliverable Acceptance | <p>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.</p> <p>Compliance with deliverable acceptance is expected to be greater than 95%.</p> <p>This SLA is calculated as follows: “% Deliverable Acceptance” = “# Deliverables accepted during period” ÷ “# Deliverables submitted for review/acceptance by the State during the period”.</p> | Fee at Risk | Monthly |

4.5 State Staffing Plan

| Staff/Stakeholder Name | Project Role | % Allocated |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|------------------|
| InnovateOhio Platform Program Lead | Program Lead / Contract Manager, second level of InnovateOhio Platform escalation | As needed |
| InnovateOhio Platform Project Manager | Program and project compliance; first point of InnovateOhio Platform escalation | 10% or as needed |
| State Project Sponsors | State management; manage according to schedule, schedule meetings, update necessary stakeholders | As needed |
| State Project Manager | Project management; manage according to schedule, schedule meetings, update necessary stakeholders | As needed |
| State Content Contributors | State content contributors – Communications Director, Digital Media Manager, Public Information Officer, 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. Offer or experience requirements (see evaluation Section 6 for details on required content)
3. Subcontractors documentation
4. Assumptions
5. Payment address
6. Staffing plan, personnel requirements, time commitment, organizational chart
7. Contingency plan
8. Project plan
9. Proposed project schedule (WBS using MS Project or compatible)
10. 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, 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 by proposed staff member in the same 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);
- 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 should 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 State staff including, but not limited to, training State staff on editing/modifying templates, updating website content and training State 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 EPA 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 State, the State may at its sole discretion request that the offeror 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 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 should 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 of similar size and scope 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 | Contact 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 Communication Plan

Provide a high-level 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 EPA 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 State 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 | | |
| Clickable Prototypes | | |
| Contractor Proposed Deliverable(s) | | N/A |
| Communication & Engagement Plan, which includes Training & Transition Plan | | |
| Fully functional website available for UAT | | |
| User Acceptance Testing (UAT) Completion | | |
| Final Project Summary | | |
| Subcontractors | | N/A |
| | 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. Enter the rate card information in this section.

| | | |
|----------------|-------------|--|
| Position Title | Hourly Rate | |
| | \$ | |
| | \$ | |
| | \$ | |
| | \$ | |
| | \$ | |

Section 6: Proposal Evaluation Criteria

6.1 Offeror Requirements

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.

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 and at least three representative examples of previously completed projects of similar size and scope by proposed staff member in the role proposed. Include project description, who it was for, and name of a contact person. | 5 | 0 | 3 | 5 | 7 |
| Offeror's Previous Experience Offeror must provide previous examples of website information architecture design, content rationalization, content design, social | 4 | 0 | 3 | 5 | 7 |

| | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| media, analytics, and all functional requirements provided in Section 3.1. | | | | | |
| Staffing Plan and Appropriateness Proposal includes staffing plan 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 details 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 State. | 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:

$$\text{Cost Summary Points} = (\text{Lowest Total Cost for Evaluation} \div \text{Offeror's Total Cost for Evaluation}) \times 200$$

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

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

The State 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 State 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 | 01/22/2020 |
| Inquiry Period begins | 01/22/2020 |
| Inquiry Period ends | 02/05/2020 at 8:00 a.m. EST |
| Proposal Response due | 02/10/2020 at 1:00 p.m. EST |

7.2 Anticipated Dates

| | |
|----------------------------------------------------|------------|
| Estimated date for selection of awarded Contractor | 02/19/2020 |
| Estimated date for commencement of work | 02/28/2020 |

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 InnovateOhio Platform 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 five (5) complete, sealed and signed physical bound copies of its Proposal response and each submission must be clearly marked **DXEPA-20-01-001 Environmental Protection Agency EPA Website Redesign** 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 EPA 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 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 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 State Agency's representative at the following address:

Agency: Environmental Protection Agency

Attention: Cathryn Allen – PIC

Address: 50 W. Town St., Suite 700
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 State'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.