



Department of Administrative Services on behalf of the Ohio Department of Job and Family Services (JFS):

ODJFS Digital Presence Redesign and Website Re-platform

InnovateOhio Platform Statement of Work Solicitation DXJFS-20-01-002

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 | 01/21/2020 |
| Inquiry period begins | 01/21/2020 |
| Pre-Proposal Conference | 01/28/2020 |
| Department of Job and Family Services (ID required for entrance) 4200 E. 5 th Ave., Room A118 Columbus, OH 43219 | 2:30 p.m. - 4:00 p.m. EST |
| Inquiry period ends at 8:00 a.m. EST | 02/04/2020 |
| Proposal response due date by 1:00 p.m. EST | 02/11/2020 |

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 Contractor's Work Effort Requirement..... | 4 |
| Section 3: Scope of Work..... | 5 |
| 3.1 Scope Description..... | 5 |
| 3.2 Requirements | 8 |
| 3.3 Deliverable Description | 11 |
| Section 4: Deliverables Management..... | 14 |
| 4.1 Submission Format..... | 14 |
| 4.2 Reports and Meetings..... | 15 |
| 4.3 Period of Performance..... | 15 |
| 4.4 Performance Expectations..... | 15 |
| 4.5 State Staffing Plan | 18 |
| Section 5: Proposal Response Submission Requirements..... | 20 |
| 5.1 Response Format and Content Requirements..... | 20 |
| Section 6: Proposal Evaluation Criteria | 25 |
| 6.1 Offeror Requirements | 25 |
| 6.2 Scored Requirements..... | 25 |
| 6.3 Price Performance Formula..... | 26 |
| Section 7: Solicitation Calendar of Events | 28 |

| | | |
|---|------------------------------------|----|
| 7.1 | Firm Dates..... | 28 |
| 7.2 | Anticipated Dates | 28 |
| Section 8: Inquiry Process | | 28 |
| 8.1 | Submitting an Inquiry | 28 |
| 8.2 | Inquiry Response and Viewing | 29 |
| Section 9: Submission Instructions & Location | | 29 |
| 9.1 | Submission Instructions | 29 |
| 9.2 | Submission Location..... | 30 |
| 9.3 | Proprietary Information..... | 30 |

Section 1: Purpose

The purpose of this project Statement of Work (SOW) is to provide the Ohio Department of Job and Family Services (ODJFS or JFS) with information technology services related to onboarding to the State of Ohio InnovateOhio Platform (IOP) environment.

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

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

Section 2: Background Information

2.1 Agency Information

2.1.1 Agency or Program Name

Ohio Department of Job and Family Services/Office of Contracts and Acquisition

2.1.2 Contact Information

Attention: ODJFS Office of Contracts and Acquisitions

Address: 30 East Broad Street, 31st Floor
Columbus, Ohio 43215

2.2 Project Information

2.2.1 Project Name:

ODJFS Digital Presence Redesign and Website Re-platform

2.2.2 Project Background & Objectives

The selected Contractor must use InnovateOhio Platform's *content-first* methodology, their own methodologies, and InnovateOhio Platform 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 Job and Family Services (ODJFS) and InnovateOhio Platform staff to ensure the new website is consistent with the InnovateOhio Platform.

The Ohio Department of Job and Family Services (ODJFS) is seeking to secure a website development and branding Contractor to provide an overall effort to improve the customer experience for <http://jfs.ohio.gov> and existing related websites.

The main objective of the new ODJFS website is to use the InnovateOhio Platform and accelerators to design, build, test and deploy all websites for <http://jfs.ohio.gov> in Phase 1 and the existing related websites in Phase 2 (see website chart under 3.1 for additional information.)

To achieve the main objectives, the new brand and website must be modern, very user-friendly and interactive, and must make public information, documents and services more accessible to the department's constituents.

Tasks are outlined in the Deliverables section.

2.2.3 Expected Project Duration

This project build must be completed on or before 06/30/2021. 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.

The Contractor must be able to make websites live at the time they are approved and accepted; site completion can be staggered throughout the 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.

A project plan with all deliverables must be submitted in a format approved by ODJFS’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, an ODJFS representative will submit that in writing to the Contractor within two weeks

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

2.3 Project Schedule

| Milestone | Date |
|---|---------------------|
| Estimated project commencement date | 02/28/2020 |
| Project kickoff with ODJFS. (Kickoff meeting to be held at a State location where project team will confirm scope, requirements, project plan and timeline, meet stakeholders, and conduct other Q&A such that all parties are in alignment and stakeholders identified.) | Contractor proposed |
| Phase 1: Requirements gathering workshops, including customer focus groups | Contractor proposed |
| Phase 1: Contractor completes the designs and demonstrates the prototypes | Contractor proposed |
| Phase 1: Contractor proposed milestones (please include in response) | Contractor proposed |
| Phase 1: Site Administrator / Content Management Training | Contractor Proposed |
| Phase 1: System and User Acceptance Testing (UAT) | Contractor Proposed |
| Phase 1: Onboarding and postproduction support | Contractor Proposed |
| Phase 2: Contractor completes the design for Phase 2 sites and innerweb prototype | Contractor Proposed |
| Phase 2: Onboarding complete | Contractor Proposed |
| Phase 2 Final site presentation and final report | Contractor proposed |

2.4 Contractor’s Work Effort Requirement

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

Phase 1 – Requirements, Alignment, Customer Feedback, Decisions, Design, ODJFS Roadmap, and Build and Deployment for the ODJFS primary public website (<http://jfs.ohio.gov>)

- Lead internal and external stakeholders through on-site Contractor-moderated meetings and information-gathering sessions to document or create the following for project and future organizational use:
 - Mission(s), audiences, goals, current and future content roadmaps;
 - Work products that enable iterative understanding of digital channel strategy across the project team and multiple stakeholders, including – at minimum – the mission, mission approach, customer segmentation, customer feedback, key performance indicators and instrumentation (analytics), and all inputs to guide the site design processes;
 - Integration approach(es), design and impacts to external resources (websites or applications hosted by the State or its providers) from service providers, including but not limited to:
 - Professional branding services including design, templates, and images that emphasize diversity, inclusion and awareness of ODJFS services and programs. The designs must optimize the user experience and help to make the ODJFS website more accessible to citizens of Ohio. The outcome of these sessions must be a design that will update ODJFS digital branding guidelines;
 - The leading of design impact meetings with the State, in which customer-exposed websites, systems and content are evaluated.
 - The demonstration of more effective paths to the public’s most-sought information;
 - The incorporation of the higher-level functionality of <http://ohio.gov>.
 - The demonstration of a more streamlined presentation of the <http://jfs.ohio.gov> websites and existing related websites;
 - The development of a functional specifications document leveraging design prototype and validated business requirements. The functional specifications must clarify how website functionality will respond to user navigation/interaction;
 - The definition of non-functional requirements (e.g., performance metrics).

- The identification of the technical gap between design prototype and business requirements; and
- The design of flow-down standards by content type, to include:
 - Specific working deliverable(s) to address the integration and management of third-party content and in-house applications' front-end changes;
 - Documented and implemented changes to governance methodology with details for keeping information architecture and *content first* compliance;
 - The use of the IOP Digital Toolkit, Sketch, InVision and other IOP tools to communicate changes needed in ODJFS interactive content (custom and third-party digital front-ends); and
 - Design prototypes to illustrate the OH|ID (external/internal) SSO user journeys.
- New information architecture and site designs for ODJFS websites to match documented strategies, created through iterative sessions;
- All project and executive presentation material needed to solicit feedback and inform stakeholders and State leadership;
- Search Engine Optimization (SEO) design and plans;
- Inventory and approaches to address confusion that may exist with other websites with similar content not on ODJFS websites; and
- Integration of internal applications and third-party functionality on the website(s) within the Contractor's scope (e.g., information architecture, design, usability testing).
- Execute all designs, approaches, and impacts to <http://jfs.ohio.gov> and its related websites as listed, as well as integration and impact coordination with stakeholder and third-party content/application providers;
- Adopt the InnovateOhio Platform Portal Builder to create the new website framework.
- Enable Geolocation content and conduct necessary training;
- Integrate the visual and user journey to include all JFS Social Media sites (Facebook, Instagram, Twitter, YouTube);
- Implement ODJFS office/service location-finding capability that enables map, search-based and geolocation-based presentation of locations. Must enable filters and other self-service capabilities based on ODJFS needs.
- Train agency communications, technology, site administrators and content authors/owners who will be responsible for editing, updating, and creating new pages for the website in Phase 1.
- Provide training and materials to allow ODJFS to create and maintain future websites;
- Execute organizational change management activities required for full adoption and roll-out of the new website and organizational impacts;
- Sync <http://jfs.ohio.gov> and other in-scope sites maps to State maps (ESRI);

- Provide a fully working and testable language translation service search feature in the Authoring/Development environment(s); and
- Lead and drive content rationalization and tagging in the IOP Portal Builder and the key word metatable in Ektron (current CMS), which is scheduled for replacement by the native IOP Portal Builder search and tagging.

Phase 2 – Additional training, awareness, remaining website builds, and deployments

- Build and deploy the remaining websites as proposed in the Statement of Work response and agreed upon in Phase 1;
- Train agency communications, technology, site administrators and content authors/owners who will be responsible for editing, updating, and creating new pages for the websites;
- Provide training, job aid access, and documented system access to enable ODJFS to create and maintain websites; and
- Execute organizational change management activities required for full adoption and roll-out of the new websites and organizational impacts.

The current website(s), phase and content notes:

Phase 1

| URL | Phase | Description | Content Notes |
|---|-------|------------------------------|---|
| http://jfs.ohio.gov | 1 | ODJFS primary public website | Includes functionality added on top of base CMS product |

Phase 2

| URL | Phase | Description | Content Notes |
|---|-------|--|---|
| http://aapi.ohio.gov | 2 | Ohio Asian American Pacific Islander Advisory Council | Content not being updated (5+ years old) |
| http://apprentice.ohio.gov | 2 | ApprenticeOhio | Updated content in 2019 |
| http://BridgesToSuccess.jfs.ohio.gov | 2 | Bridges (program for youth aged out of foster care) | Links to OMJ and ApprenticeOhio |
| http://data.jfs.ohio.gov | 2 | ODJFS Data Dashboard | Simple content wrapper with embedded DAS-hosted Tableau reports |
| http://earlychildhoodohio.org | 2 | Early Childhood Ohio (cross-agency website for early childhood programs) | Multiple agency website |

| | | | |
|---|---|--|---|
| http://emanuals.jfs.ohio.gov | 2 | eManuals (ODJFS electronic program/policy manuals) | Complex content structure, with extensive functionality added on top of base CMS product |
| http://humanservices.ohio.gov | 2 | Retired website; redirects all requests | Requires content rationalization with jfs.ohio.gov |
| http://innerweb.odjfs.state.oh.us | 2 | ODJFS Innerweb (internal website) | Large content volume, with functionality added on top of base CMS product – focus on external first |
| http://ipp.odjfs.state.oh.us | 2 | Internal Policy and Procedure Manual (ODJFS internal policies) | Complex content structure, with extensive functionality added on top of base CMS product |
| http://ohioanalytics.gov | 2 | OhioAnalytics | Requires content rationalization with jfs.ohio.gov |
| http://ohioheretohelp.ohio.gov | 2 | Retired website; refers visitors to other websites | Displays message directing visitors to other websites |
| http://ohioired.gov | 2 | Retired website; redirects all requests | Requires content rationalization with jfs.ohio.gov |
| http://omj.ohio.gov | 2 | Supplemental content for OhioMeansJobs.com | Content is a supplement to the OhioMeansJobs.com (jobseeker.ohiomeansjobs.monster.com) website |
| http://preventchildabuse.ohio.gov | 2 | Retired website; redirects all requests | Requires content rationalization with jfs.ohio.gov |
| http://secure.jfs.ohio.gov | 2 | Secure content for jfs.ohio.gov website | Secure content (HTTPS), branded and interlinked with jfs.ohio.gov website |
| http://www.web.ucrc.state.oh.us | 2 | Unemployment Compensation Review Commission | Informational structure with links to policy |

3.2 Requirements

The Contractor must collaborate with ODJFS stakeholders during the first week of the project to clarify ODJFS business requirements in addition to the requirements stated herein.

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 website mission support;
- B. All work must be customer-focused and data-driven in alignment with InnovateOhio and the InnovateOhio Platform;

- C. All content hosted on the InnovateOhio Platform (IOP) must meet all IOP and other State policies, such as accessibility and mobile-first design;
- D. All InnovateOhio Platform hosted content must render on supported browsers in under one second;
- E. Identification and execution of all needed steps must be completed to elevate primary search engine results in support of the mission of ODJFS;
- F. Content must follow InnovateOhio Platform's *content-first* methodology;
- G. Agency website administrators and content authors/owners must be provided hands-on training to add content to the InnovateOhio Platform via the Portal Builder, as well as other available tools and accelerators, as appropriate;
- H. Organizational change management activities must be executed;
- I. Project status reporting must take place via the InnovateOhio Platform ATLAS (Atlassian) toolset. A weekly status report (PDF) must be sent to the ODJFS Project Manager (PM);
- J. The websites must be built using responsive web design to support all screen resolutions and device types;
- K. The websites must be compatible with multiple browsers, including but not limited to Google Chrome, Mozilla Firefox, Edge, Safari, and the factory default browsers on iOS and Android mobile devices, and must be compatible with the current version and three previous versions of the browsers;
- L. State staff must be trained on creating/updating websites and content, and running reports using analytics software (estimated 5-8 total trainings);
- M. Content First Training needs delivered in a Train the Trainer method. So that ODJFS can continue the role out and keep up with Content Author training for site stakeholders;
- N. The websites must include the ability for ODJFS staff to run site analytic reports.
- O. All in-scope website forms must leverage the InnovateOhio Platform Webform tools. Training and transition of ownership of all forms to ODJFS must be completed by Phase 2 or no later than 6/30/2021;
- P. Contractor must leverage existing design system and must comply with design system change process as needed in this project;
- Q. 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 Contractor is responsible for providing and performing accessibility and JAWS testing throughout the lifecycle of the project;
- R. The websites must employ Search Engine Optimization (SEO) best practices;
- S. The following requirements must be employed in the creation of a virtual portal(s):
 - a. Libraries content, code and Java and/or JavaScript required components must be created;
 - b. Libraries, workflow elements, categories, personalization components and other elements must be built to match the functional requirements of the

- application and the non-functional requirements that need to be fulfilled by the configuration of IOP Portal Builder; and
- c. Unit and system integration issues/remediation must be included in System Integration Issue/Remediation documentation prior to UAT.
- T. All CMS content must be imported and uploaded as needed; and
- U. The following functionality, which currently exists in one more of the existing websites, must be replicated unless the stakeholders agree that a given functionality is no longer needed:
- a. Ability for content authors to create structured content, organized by one or more hierarchies of categories. Site visitors must be able to browse and drill down through the categories and search for keywords across a whole hierarchy or within any given category or subcategories. Content authors must be able to maintain this content on an item-by-item basis, without the need to edit the full list each time;
 - b. Ability for content authors to schedule content to be published at a specific date and time;
 - c. Ability for content authors to create and maintain RSS feeds;
 - d. Ability to create redirects from a URL under a website's domain to a new URL, including wildcard redirects (e.g., any URL beginning with a given string is redirected to given URL);
 - e. Ability to create versioned content, in which the previous version of a document can be optionally made available to the site visitor to view via the public site (not just the content authors' work area); and
 - f. Ability for other web applications (external to the platform hosting the website) to pull common content from the website, such as a list of links or a snippet of HTML for a common header or footer.

3.2.2 Project and Contractor Requirements

- A. Phase 1 of the project must be completed no later than 12 months from the end of the Project Initiation phase. This includes the process of defining its objectives, scope, purpose and deliverables to be produced;
- B. Contractor must have the capability and capacity to perform content design, satisfy all requirements described in Section 3.1, and build/deploy the website(s);
- C. Contractor must have the capacity and ability to provide technical assistance and training to State staff, including, but not limited to, the following activities: editing/modifying editable forms and templates, updating content, and running website analytics reports; and
- D. Contractor must be able to adhere to InnovateOhio Platform-hosted solution requirements, including use of Portal Builder as configured, hosted, and supported by the Department of Administrative Services (DAS) and per the requirements set forth herein.

Contractor is responsible for travel expenses and cannot charge InnovateOhio Platform or state for incurred expense

3.3 Deliverable Description

3.3.1 Detailed Description of Deliverables

- Contractor and ODJFS must agree upon deliverable dates. Once the project schedule and plan are set, Contractor must meet specified deliverable timeframes. Any deviation from established schedule and plan requires prior approval (in writing) from the ODJFS.
- Deliverables must be submitted ODJFS Project Manager and InnovateOhio Platform Contract Manager in the InnovateOhio-approved format;
- Deliverable acceptance criteria and time period for deliverable testing and acceptance must be established with ODJFS Project Management and InnovateOhio Platform Contract manager within the first two weeks of Project Initiation;
- If a deliverable cannot be completed per the approved schedule and plan, Contractor must notify in writing to ODJFS Project Manager and InnovateOhio Platform Contractor Manager 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;
- If ODJFS Project Manager determine a deliverable is no longer needed, ODJFS Project Manager will provide this information in writing to the Contractor within 2 weeks. Monies cannot be reallocated; and
- Deliverable reviews will be conducted by the InnovateOhio Platform Contract Manager and ODJFS designee within 5 working days of deliverable submission.

3.3.2 Descriptions by Deliverable Name

| Deliverable Name | Description |
|--|---|
| Kickoff Meeting | Kick off meeting conducted |
| Project Plan | Includes breakdown of tasks, milestones, deliverables, milestone dates, deliverable dates, owners, risks, issues, and critical path (baselined). Contractor must proactively maintain the baselined and approved project plan throughout Phase 1 and Phase 2. |
| User analysis and usability strategy by conducting interviews and focus groups | User Analysis and usability strategy by conducting interviews and focus groups |
| Business, Functional, and Technical Requirements | Documentation of non-functional, functional, and technical requirements. |
| Contractor Proposed Deliverables | Prior to the execution of the SOW, Stand and Contract to agree on all deliverables, payment eligibility, and acceptance process |
| Technical Design/Functional Design (Clickable Design Prototype) | Functional and technical design with the prototype is accepted by state Project Managers and IOP Contract Manager |

| | |
|---|--|
| User Acceptance Testing | The final implementation of the website available to a limited number of staff and focus group users to test. This includes incorporating feedback from staff and focus group. |
| Production Environment Build Deployment | Site is deployed into the production environment |
| Communication and Engagement Plan | State PM and IOP Contract Manager acceptance |
| Staff training complete and site documentation available | Content author training, Training of Trainer documentation, and site documentation approved by state Project Managers and IOP Contract Manager |
| Digital Branding Strategy | Digital Branding Strategy and agency Style Guide approved by State PM and IOP Contract Manager |
| Final Project Summary | Contractor is required to submit a final project summary to ODJFS and the 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 / updated throughout project | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Project Plan | TBD | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| User analysis and usability strategy by conducting interviews and focus groups | TBD | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Business, Functional, and Technical Requirements | TBD | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Contractor Proposed Deliverables | TBD | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Technical Design/Functional Design (Clickable Design Prototype) | | Yes | State acceptance. Meets criteria established in Deliverable Expectations Document |

| | | | |
|--|-----|-----|---|
| User Acceptance Testing | TBD | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Production Environment Build Deployment | TBD | Yes | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Communication and Engagement Plan | | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Staff training complete and site documentation available | TBD | No | State acceptance. Meets criteria established in Deliverable Expectations Document |
| Digital Branding Strategy | TBD | No | State acceptance. |
| Final Project Summary | TBD | Yes | State acceptance |
| Subcontractor | TBD | No | State acceptance |

3.3.4 Roles and Responsibilities

| Project Activity Description | Contractor | State |
|---|-------------------|--------------|
| Kickoff Meeting | X | X |
| Project Plan | X | X |
| User analysis and usability strategy by conducting interviews and focus groups | X | X |
| Business, Functional, and Technical Requirements | X | X |
| Contractor Proposed Deliverables | | X |
| Technical Design/Functional Design (Clickable Design Prototype) | X | |
| User Acceptance Testing | X | |
| Production Environment Build Deployment | X | |
| Communication and Engagement Plan | X | |
| Staff training complete and site documentation available | X | |
| Digital Branding Strategy | | X |
| Final Project Summary | 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 ODJFS's data on a secure data storage unit (hard drive, USB, etc.). If multiple storage units are necessary, ODJFS must be notified. Data provided by ODJFS will be used solely for the creation of this website.

3.3.6 Resource Requirements

ODJFS expects the Contractor to perform their required work at their location except for presentations.

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

Contractor must clearly identify technology and tools they will utilize to develop the website 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. Contractor must provide a weekly status that has the status of the scope, schedule and project. The Contractor must email the status report to ODJFS (must be able to email status report).

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

| PM Artifact/Project Work Product | Submission | Format |
|---|------------------------|--|
| Contractor must follow the InnovateOhio Platform Program Management methodology. Contractor and ODJFS will align on work products required for this | During each SDLC phase | Templates will be provided by the InnovateOhio Platform Program. |

| | | |
|--|----------------------|--|
| project within the first 2 weeks of the project | | |
| Weekly ODJFS Status Report | TBD | The report must include specific information about the progress of the project. The report must be in a format that makes it easy to read and follow (Microsoft Office compatible format). |
| Weekly project dashboard for InnovateOhio Platform Status Report | Wednesdays at 3 p.m. | Format will be provided by InnovateOhio Platform PMO |
| Final Project Report | TBD | In a report format based on a template provided by InnovateOhio Platform. |

4.2 Reports and Meetings

Contractor must conduct weekly status meetings with ODJFS PM team. ODJFS PM will establish meeting date/time/location. Meetings can be in person or over the phone at the discretion of the ODJFS PM.

Contractor must submit a project status report that includes work performed and completed for the current week and planned work for the subsequent week, as well as documentation of issues and risks encountered or outstanding, with an explanation of the cause and resolution / proposed resolution.

Contractor is required to provide the InnovateOhio Platform with a weekly status reports summary. Status reports are due to the State by 3 p.m. each Wednesday; template will be provided by InnovateOhio Platform.

4.3 Period of Performance

All phases must be completed on or before 6/30/2021. Performance is based on the delivery and acceptance of each deliverable.

4.4 Performance Expectations

This section establishes performance specifications for the service level agreements (SLA) between the Contractor and 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 ("total fee at risk"). The total 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, 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

The Contractor will be assessed for each SLA failure, and the "performance credit" shall not exceed the monthly fee at risk for that period. The performance credit is the amount due to the 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 90%.</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 |
| System Test Execution Exit Quality Rate | <p>The System Test Execution Exit Quality Rate will, prior to UAT, be determined using the results of Contractor generated pre-test strategy, executed testing cases including functionality, performance, integration, interfaces, operational suitability and other test coverage items comprising a thorough Contractor executed system testing effort.</p> | Fee at Risk | As Mutually Agreed |

| | | | |
|--|--|--|--|
| | <p>Regression Testing must be performed as necessary. "System Test Execution Exit Quality Rate" means the inventory of all test cases performed in conjunction with Contractor system testing or testing otherwise preceding the State's User Acceptance Testing efforts, presentation of resultant test performance inclusive of identified errors or issues (by priority), impact areas and overall testing results to the State otherwise referred to as "Testing Results".</p> <p>This Service Level begins upon Contractor presentation of the aforementioned Testing Results to the State prior to the State conducting UAT. The initial service level shown for this SLA will be 90.0%, exclusive of Critical and High defects (which must be resolved prior to presentation to the State) and will be validated during an initial measurement period. The initial and subsequent measurement periods will be as mutually agreed by the Parties. Following the initial measurement period, and as a result of any production use the Service Level will be adjusted to 95%.</p> <p>Compliance with the System Test Execution Exit Quality Rate is expected to be greater than or equal to 90% prior to UAT and greater than or equal to 95% in production</p> <p>This SLA is calculated as follows: "System Test Quality/Exit Rate" equals "Total Test Cases Passing Contractor System Test Efforts" divided by "Total Executed during System Testing Effort".</p> | | |
|--|--|--|--|

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 | Ensures that the project delivers the agreed upon business benefits and approves major deliverables. | 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, ODJFS Content Contributors | As needed |

Section 5: Proposal Response Submission Requirements

5.1 Response Format and Content Requirements

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

Each Proposal must contain the following:

1. Cover letter with signature
2. Offeror experience requirements (see evaluation Section 6 for details on required content)
3. Subcontractors documentation
4. Assumptions
5. Payment address
6. Staffing plan, personnel requirements, time commitment, organizational chart
7. Contingency plan
8. Project plan
9. Proposed project schedule (work breakdown structure (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.
- 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 subcontractor, with the following included:

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

- f. A statement that the subcontractor has read and understood the Invitation For Proposals (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 to which the assumption is applicable. 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, email).

All changes in staffing will require submission of a new resume and approval by the JFS designee.

| 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 to meet the 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 in Clarity, Workfront, Microsoft Project or another approved tool.

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 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 the State within the usual payment terms of the State.

| Deliverable | Phase 1 | Phase 1 | Phase 2 | Phase 2 |
|-------------------------|-------------------------------------|--|-------------------------------------|--|
| | Total Estimated Work Effort (Hours) | Not-to-Exceed Fixed Cost for Deliverable | Total Estimated Work Effort (Hours) | Not-to-Exceed Fixed Cost for Deliverable |
| Kick off Meeting | | N/A | N/A | N/A |

| | | | | |
|---|--|-----|-----|-----|
| Project Plan | | N/A | N/A | N/A |
| User Analysis and usability strategy by conducting interviews and focus groups | | N/A | | N/A |
| Business, Functional, and Technical Requirements | | N/A | | N/A |
| Contractor Proposed Deliverables | | N/A | | N/A |
| Technical Design-Functional Design (Clickable Design Prototype) | | | | |
| User Acceptance Testing | | N/A | | N/A |
| Production Environment Build Deployment | | | | |
| Communication and Engagement Plan | | N/A | | N/A |
| Staff training complete and site documentation available | | N/A | | N/A |
| Digital Branding Strategy | | N/A | | N/A |
| Final Project Summary | | | | |
| Subcontractor | | N/A | | 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 the 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 |
|---|--------|---------------|-----------------|-------|---------|
| 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 |

Total Points = Technical Proposal Points + Cost Summary Points

6.3.1 Technical Proposal Points

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

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

6.3.2 Cost Summary Points

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

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

The 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 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 | 01/21/2020 |
| Inquiry Period begins | 01/21/2020 |
| Pre-Proposal Conference | 01/28/2020 |
| Department of Job and Family Services (ID required for entrance) 4200 E. 5th Ave., Room A118 Columbus, OH 43219 | 2:30 p.m. - 4:00 p.m. EST |
| Inquiry Period ends | 02/04/2020 |
| Proposal Response due | 02/11/2020 |

7.2 Anticipated Dates

| | |
|--|------------|
| Estimated date for selection of awarded Contractor | 02/18/2020 |
| 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 eight (8) complete, sealed and signed physical bound copies of its Proposal response and each submission must be clearly marked **DXDJFS-20-01-002 Department of Job and Family Services 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 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 one (1) digital and eight (8) hard copies to the state agency's representative at the following address:

Address:

Attention: ODJFS Office of Contracts and Acquisitions

30 East Broad Street, 31st Floor

Columbus, Ohio 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 the 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.