Ohio Administrative Knowledge Systems (OAKS) Managed Service Benchmark and Transition Planning Assistance

Prepared April 23, 2012

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

State Term Schedule

Table of Contents

INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR QUOTATION

Please consider this as the State of Ohio, Department of Administration, Investment and Governance Division's Request for Quotation for the following project:

Ohio Administrative Knowledge Systems (OAKS) Managed Service Benchmark and Transition Planning Assistance

The Department of Administrative Services (DAS), Office of Information Technology (OIT), Investment and Governance Division (IGD) of Ohio Administrative Knowledge System (OAKS) is seeking quotations for a qualified vendor to provide Ohio Administrative Knowledge Systems (OAKD) Managed Service Benchmark and Transition Planning Assistance application-related professional services for the State of Ohio and Investment and Governance Division (IGD). The project will begin on or after the award date until the work is completed to the satisfaction of the State and the vendor is paid or December 31, 2012, whichever is sooner.

BACKGROUND

The DAS Office of Information Technology (OIT) delivers statewide information technology and telecommunication services to state government agencies, boards and commissions, as well as policy and standards development, lifecycle investment planning and privacy and security management.

The Ohio Administrative Knowledge System (OAKS) is an enterprise resource planning software system integrating central government business functions, including human resources, procurement, budgeting, accounting and asset management.

During the past decade, the State of Ohio has made significant investments in developing and deploying a PeopleSoft application suite, named the Ohio Administrative Knowledge System (OAKS). The deployment of PeopleSoft was completed in July 2008 and was supported operationally by a combination of State employees and significant staff augmentation from third-party providers.

Following the implementation of PeopleSoft, OAKS management and sponsors evaluated the post-implementation environment in light of their goals to improve overall performance, efficiency and cost control while mitigating risks and providing a stable platform to build new service offerings (e.g. Shared Services).

In order to deal with perceived deficiencies and rising/unpredictable costs, a Managed Services option was investigated. This proved to be a lower, more predictable cost and risk opportunity for the State.

Based on both internal and third-party reviews and assessments, it was ultimately decided that the State would enter into a 5-year agreement with a Managed Services Provider (MSP) in February 2009 to operate the OAKS applications and infrastructure.

OBJECTIVES

The State has the following objectives that it wants the Work to fulfill, and it will be the Vendor's obligation to ensure that the Work meets these objectives:

1. Perform a benchmark comparison against a standard set of industry measures comparing the State of Ohio's managed services program to peer organizations including:
    a. Comparison of costs to industry and peer benchmarks
    b. Comparison of service levels to industry and peer benchmarks
    c. Comparison of industry best practices to the execution of the State's managed services provider

2. Provide a business case analysis and develop a transition plan detailing the options available to the State of Ohio as their managed services contract nears the current contract end date and present a recommendation for how the State of Ohio should move forward.

Overview of the Work's Scope

The State of Ohio requests the services of an independent third party to compare the quality and price of the services received from its current Managed Services provider against benchmarks for the quality and price of well-managed operations performing services of a similar nature.

Secondly, the State of Ohio is seeking assistance in developing a business case and transition plan which presents the options and a recommendation of how the State should proceed when the current managed services contract expires.

STATEMENT OF WORK (SOW)

The State will provide oversight for the Work, but the Vendor must provide overall Work management for the tasks under this RFQ, including the day-to-day management of its staff. The Vendor also must assist the State with coordinating assignments for State staff, if any, involved in the Work. Additionally, the Vendor must provide all administrative support for its staff and activities. Throughout the Work effort, the Vendor must employ ongoing management techniques to ensure a comprehensive Work Plan is developed, executed, monitored, reported on, and maintained.

The Vendor must provide a Project Manager for the Work. The Vendor must employ the proposed Project Manager as a regular, fulltime employee on the Quote submission date and throughout the term of the Contract, including all renewals of it. The Vendor's full-time regular employees must perform at least 75**% of the effort required to complete the Work.**

BENCHMARKING

General

The State of Ohio requests the services of an independent Third Party (a "Benchmarker") to compare the quality and price of the Services received from the current Managed Services provider ("MS Vendor") against the quality and price of well-managed operations performing services of a similar nature. The State will use benchmarking results to validate that it is obtaining pricing and levels of service that are competitive with benchmark market rates, prices and service levels.

Methodology

The State expects that the Benchmarker will include the following as part of the process:

- The Benchmarker will conduct the Benchmark using a relevant comparative sample of similarly large, complex organizations
- Prior to performing the comparison, the Benchmarker will provide and review the Benchmark methodology with the State (and the MS Vendor) and will explain how each comparator in the representative sample compares to relevant normalization factors and the normalization approach that will be applied.
- Normalization will be used by the Benchmarker to ensure appropriate adjustments are made to all data relating to each of the comparators in the representative sample to account for any differences between the services provided to the state and the services provided to the respective comparator that may impede a true "like-for-like" comparison. These normalization factors may include:
    - Scope and nature of services;
    - Respective services environment;
    - The hardware or software used or required to provide the services;
    - Geographic disparity of services delivery and recipient locations;
    - Industry differences affecting information technology costs;
    - Economies of scale;
    - Size of investment;
    - Volume of services being provided;
    - Duration of the contractual commitment;
    - Service levels;
    - Complexity factors;
    - MS Vendor contract considerations and constraints;
    - Degree of standardization;
    - Any additional or value added services performed by the MS Vendor;
    - The State or the Comparators' unique requirements or limitations;

  - Terms and conditions under which the State received services;
  - **Must normalize across "on-shore" provided services only since the State requires all managed services to be provided by on-shore personnel only**
  - Terms and conditions under which the Comparators received services, and ;
  - Any other relevant factors.
- The Benchmarker will meet with the State and the MS Vendor as necessary to explain how the normalization was performed on each Comparator in the representative sample and will provide the State the pre- and post-adjustment comparator data, while preserving the confidentiality of the comparator.
- The representative sample used by the Benchmarker for the benchmark will be reasonably current (i.e. based on services provided to the State and the MS Vendor no more than 12 months prior to the start of the Benchmark).
- The State and the MS Vendor will have an opportunity to verify the benchmark conformed to the agreed benchmark process.
- The benchmark will be conducted in a manner that will not unreasonably disrupt either party's performance of services.

<u>Note</u> - Any Benchmarker engaged by the State shall not be a direct MS Vendor competitor for outsourcing or managed services and will agree in writing to be bound by the confidentiality and security provisions specified in this Scope of Work. The Benchmarker engaged by the State will also specify that the data provided by the State and the MS Vendor may not be used for any purpose other than conducting the benchmark of the services.

As stated above, this process must be transparent to the State of Ohio (and to the MS Vendor). The State desires the focus on transparency for not only the results, but also the benchmarking methodology, data, and analytical process applied.

As a result of this benchmark study, the State of Ohio is looking for opportunities to drive both operational and strategic improvements. The State of Ohio views this benchmark as an opportunity for understanding and rationalizing prices, providing a pathway for identifying and addressing service gaps, providing inputs to strategic decisions regarding continuation of outsourcing services, and supporting positive behavior of all parties to improve the existing outsourcing relationship.

MANAGED SERVICES TRANSITION

General

The objective of this project is to analyze the options, document the alternatives open to the State of Ohio, and recommend a go-forward course of action for the State of Ohio as its existing managed services agreement reaches its termination point in July 2014. To that end, the State of Ohio is seeking assistance in developing a business case which presents the options and a recommendation of how the State should proceed when the current managed services contract expires in June 2014. The business case should address at least the following topics:

- Identify and assess relevant go-forward options.
    - Identification and evaluation of the potential go-forward options, including one-time and on-going costs, tangible and intangible benefits. Migration approach options to be investigated would include at least the following:
        1. Re-bid contract as is currently structured
        2. Re-bid, separating AO and IO contract portions
        3. Execute extension to current contract
        4. Transition to internal State operations – This assessment will address the option of moving the services performed by the MS Vendor back to State of Ohio with the State providing the resources (as employees) as well as potentially some staff augmentation vendors. This analysis will project costs and service level expectations for support services if provided within State facilities using State provided resources for:
            - Infrastructure Management
            - Application Management
            - Both combined
        5. A potentially expanded scope of managed services
- Recommend the best option for the State based on an evaluation of all of the options and factors
- Document a plan for how the State of Ohio should move forward based on the recommended option, including tasks that would need to take place prior to transition to a new recommended option for operations.

Each vendor responding to this solicitation must produce the deliverables set for OAKS Managed Service Benchmark and Transition Planning Assistance projects as identified in the tables below. Note that fixed cost quotes are to be included for each deliverable. Cost data should be provided showing expected effort hours and STS-approved rates for each deliverable.

Benchmark Deliverable #	Benchmark Deliverable Name	Benchmark Deliverable Description
1	Work Plan and Schedule	Detail plan of the work to be performed and associated schedule (Microsoft Project format)

Benchmark Deliverable #	Benchmark Deliverable Name	Benchmark Deliverable Description
2	Benchmark Survey	Benchmark against peer group Focus of benchmark should include but not be limited to: • Infrastructure Operations o Contract compliance o Service gap identification o Server set-up o Server maintenance o Data storage o Network management o Security (including: implementation and application of best practices; use of security technologies; incident handling; data protection and handling; patch management; environment monitoring) o Monitoring o Comparative pricing o Quality of service o Effective use of state of the market tools and techniques • Application Operations for PeopleSoft ERP o Contract compliance o Service gap identification o Day-to-day operations o Break/Fix o Enhancements and maintenance o Monitoring o Bundle and patch application o Comparative pricing o Quality of service
3	Identification of Performance Issues	Identification of significant customer service performance issues and suggestions for remediation
4	Evaluation against ITIL frameworks	Evaluation of organization and processes as compared to ITIL frameworks. Identification of significant deviation from standard practices and recommendations for remediation. Review and assessment of SLA/SLO measures.

Benchmark Deliverable #	Benchmark Deliverable Name	Benchmark Deliverable Description
5	Recommendations for practice improvement	Recommendations for improving existing organizational best practices that may be in practice to a next level of maturity and competency. Examples include: ▪ Technology ▪ Tools ▪ Reporting ▪ Score carding
6	Plans to Initiate Continual Self-Improvement Processes	Define an approach and plan to institute a program of continual self-assessment and improvement including identification of key performance indicators

Transition Deliverable #	Transition Deliverable Name	Transition Deliverable Description
1	Transition Business Case, including:	Business Case Document (see attached template)
A	Roles and Responsibilities	- Identification of key stakeholders - Identification of participants in the business case development process
B	Problem Definition	- Background and overview of the case for change - Definition of the transition options o Description of the option o Rationale as to why this is a viable option o Identification of the advantages and disadvantages of each option o Alignment with Best Practice o Identification of the risks associated with each option
C	Recommendation	- Identification of the recommended option and the rationale for the recommendation
D	Impact Assessment	- Description of migration approach - Identification of the affected organizations and the impact of the recommendation on the organization - Risk Assessment
E	Cost Benefit Analysis	- Financial Summary - Resource Needs and Plan - Financial Costs and Benefits of each option - Non-Financial Costs and Benefits of each option - Assumptions
F	Go Forward Plan	- Identification of Activities and level of effort - Schedule

Meeting Attendance and Reporting Requirements. The Vendor's management approach to the Work must adhere to the following meeting and reporting requirements:

- Immediate Reporting - The Work Manager or a designee must immediately report any staffing changes for the Work to the Work Representative (see: Attachment Four: Part Two: Replacement Personnel).
- Attend Status Meetings **-** The Work Manager and other Work team members must attend status meetings with the Work Representative and other people deemed necessary to discuss Work issues. The Work Representative will schedule these meetings, which will follow an agreed upon agenda, and allow the Vendor and the State to discuss any issues that concern them.
- Provide Status Reports - The Vendor must provide written status reports to the Work Representative at least one full business day before each status meeting.
- The Vendor's proposed format and level of detail for the status report is subject to the State's approval.
- Prepare Monthly Status Reports - During the Work, the Vendor must submit a written monthly status report to the Work Representative by the fifth business day following the end of each month. At a minimum, monthly status reports must contain the following:
    - A description of the overall completion status of the Work in terms of the approved Work Plan (schedule and cost);
    - Updated Work schedule;
    - The plans for activities scheduled for the next month;
    - The status of any Deliverables;
    - Time ahead or behind schedule for applicable tasks;
    - A risk analysis of actual and perceived problems; and
    - Strategic changes to the Work Plan, if any.

ADMINISTRATIVE

QUOTE INQUIRIES

Vendors may make inquiries regarding this RFQ any time during the inquiry period listed on the RFQ cover sheet. The State may not respond to any improperly formatted inquiries. The State will try to respond to all inquiries within 24 hours, excluding weekends and State holidays. The State will not respond to any inquiries received after 8:00 am on the inquiry period end date. The State may extend the quote due date.

To make an inquiry, vendors must use the process outlined below.

- Access the State Procurement Web site at http://procure.ohio.gov/.
- From the Navigation Bar on the left, select "Find It Fast".
- Select "Doc/Bid/Schedule #" as the Type.
- Enter the RFQ number found on the first page of this RFQ (the RFQ number begins with "DAS").
- Click the "Find It Fast" button.
- On the document information page, click the "Submit Inquiry" button.
- On the document inquiry page, complete the required "Personal Information" section by providing:
    - First and last name of the prospective vendor's representative who is responsible for the inquiry;
    - Name of the prospective vendor;
    - Representative's business phone number, and
    - Representative's e-mail address.
- Type the inquiry in the space provided, including:
    - A reference to the relevant part of this RFQ;
    - The heading for the provision under question, and
    - The page number of the RFQ where the provision can be found.
    - Click the "Submit" button.

A vendor submitting an inquiry will receive an immediate acknowledgement that the State has received the inquiry as well as an e-mail acknowledging receipt. The vendor will not receive a personalized response to the question nor notification when the State has answered the question.

Vendors may view inquiries and responses on the State's Procurement Web site by using the "Find It Fast" feature described above and by clicking the "View Q & A" button on the document information page.

All questions must be submitted by 8:00 am on May 29, 2012. Questions submitted after this time will not receive a response from the state.

DUE DATES

All quotations are due by 1:00 pm, EST, on June 1, 2012. Any quotation received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late quotations will not be evaluated for award.

SCHEDULE OF EVENTS

All times listed are Eastern Standard Time (EST).

Event	Date
1. RFQ Distribution to Vendors	May 24, 2012
2. Questions from Vendors due	8:00 a.m., May 29, 2012
3. Responses to Vendors due	4:00 p.m., May 30, 2012
4. Submittal/Quotation Due Date	1:00 p.m., June 1, 2012
5. Target Date for Review of Submittal/Quotation	June 1 – June 5, 2012
6. Interviews of Candidates, if needed	June 6 – June 8, 2012
7. Anticipated decision and selection of Vendor	June 11, 2012
8. Anticipated commencement date of work	June 18, 2012

EVALUATION FACTORS FOR AWARD

EVALUATION

The following will be considered in determining the vendor to be selected for this engagement, according to a standardized scoring methodology:

- Relevant experience with three references demonstrating requirements on projects of similar size and scope in the past five years.
- Relevant skill level
- Proposed Vendor rate(s)

Weight	Criteria
25%	An assessment of the Vendor's ability to deliver the stated deliverables in accordance with the specifications set out in this RFQ.
25%	Availability of sufficient high quality Vendor personnel with the required skills and experience for the specific approach proposed.
25%	The extent to which Vendor's proposed approach fulfills State of Ohio's stated deliverables as set out in this RFQ.
25%	The Vendor's stability, experiences, and record of past performance in delivering such services.
100%	

Price Performance Formula. The evaluation team will rate the Quotes that meet the Mandatory Requirements based on the following criteria and respective weights.

Criteria	*Percentage*
Technical Quote	70%
Cost Summary	30%

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

The offeror with the highest point total for the Technical Quote will receive 700 points. The remaining offerors will receive a percentage of the maximum points available based upon the following formula:

> Technical Quote Points = (Offeror's Technical Quote Points/Highest Number of Technical Quote Points Obtained) x 700

The offeror with the lowest proposed Not-To-Exceed Fixed Price will receive 300 points. The remaining offerors will receive a percentage of the maximum cost points available based upon the following formula:

Cost Summary Points = (Lowest Not-To-Exceed Fixed Price/Offeror's Not-To-Exceed Fixed Price) x 300

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

Total Points = Technical Quote Points + Cost Summary Points

- The Vendor will not be permitted to substitute personnel for those submitted for RFQ evaluation (during the RFQ evaluation or at project start-up), except when a candidate's unavailability is no fault of the Vendor (e.g., Candidate is no longer employed by the Vendor, is deceased, etc.). Note: If a substitution situation occurs, the quote will be re-evaluated. If the substitution gives the Vendor an unfair advantage during the RFQ process, the quote may be eliminated or the other vendors will also be given the chance to submit substitutions of personnel also.
- All quotes will be evaluated for meeting the requested information. Incomplete quotes will not be reviewed. The quotes that provided the requested information will be evaluated for at least the highest prioritized candidate. The quotes will be scored based on the criteria requested above. We reserve the option to interview the top candidates. Candidate substitutions between the quote evaluation and interview periods are highly discouraged (see above). If OIT has other qualified candidates, the Vendor's quote requesting a substitution will be denied at this stage and the quote will be eliminated from evaluation. If OIT does not have enough qualified candidates due to the substitution, all received quotes will be asked to confirm their candidates, given a couple of days to provide replacements, and the entire process will start over.

TERM AND CONTRACT

The contract will be through State Term Schedule (STS) contracts and must reflect or be lower than STS rates, and must use STS categories.

A list of current STS holders can be found at: http://procure.ohio.gov/proc/index.asp

STATUS REPORTING

The Vendor will provide weekly status reports to the State OIT. The Vendor will be responsible for meeting all timelines designated by assigned Project manager. Payment for services will be based on deliverable completion subject to the State's approval of each deliverable. The State will review deliverables and provide feedback or approval for each deliverable within 5 business days of receipt of deliverable.

NON-DISCLOSURE AGREEMENT

Both candidate and company will be required to sign a non-disclosure agreement which prevents disclosure of any data obtained while on the engagement which can be used to personally identify any parties at any time either during or after the engagement.

GUIDELINES FOR QUOTATION PREPARATION

QUOTATION SUBMITTAL

Each Vendor must submit three (3) complete, sealed and signed copies of its quotation and each quotation must be clearly marked "OAKS Managed Service Benchmark and Transition Planning Assistance" on the outside of its envelope along with Vendors name.

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

Each quote must be organized in the same format as described below. Any material deviation from the format outlined below may result in a rejection of the non-conforming quote. Each quote must contain an identifiable tab sheet preceding each section of the quote. Quote should be good for a minimum of 45 days.

- Cover Letter (include phone and e-mail contact)
- State Term Schedule Number
- STS Labor Category Code
- Vendor Information:
  - Vendor References (3 minimum) - * (**See Attachment One**)
  - Vendor Resume
  - Staff Resume Templates /Vendor Candidate Resumes - *(**See Attachment Two**)
  - Additional Vendor Information (optional) – vendor form
- Vendor Hourly Rate
- Cost Summary - *(**See Attachment Three**)
- Description of Approach and Methodology
- Description of Deliverables
- Description of Database of Comparison Data (including: data sources, size, no. of contributing organizations, and amount of public vs. private sector representation)
- Description of Comparable Vendor Engagements (minimum three)
- Project Schedule
- Description of any proprietary tools to be used
- Profile Summary Forms
- Time Commitment Expectations for Vendor and State personnel
- Assumptions
- Work Plan
- Support Requirements
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form

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

Quotations MUST be submitted to the State's Procurement Representative:

Ms. Nychola Richardson, MAS1
30 East Broad Street, 39th Floor
Columbus, OH 43215

PROPRIETARY INFORMATION

All quotations and other material submitted will become the property of the State and may be returned only at the State's option. Proprietary information should not be included in a quotation or supporting materials because the State will have the right to use any materials or ideas submitted in any quotation without compensation to the Vendor. Additionally, all quotations will be open to the public after the contract has been awarded.

The State may reject any Quote if the Vendor takes exception to the terms and conditions of this RFQ.

WAIVER OF DEFECTS

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

REJECTION OF QUOTATIONS

The State may reject any quotation that is not in the required format, does not address all the requirements of this RFQ, or that the State believes is excessive in price or otherwise not in its interest to consider or to accept. The State will reject any Non-STS responses. In addition, the State may cancel this RFQ, reject all the quotations, and seek to do the work through a new RFQ or other means.

EVALUATION OF QUOTATIONS

Clarifications and Corrections

During the evaluation process, the State may request clarifications from any Vendor under active consideration. It also may give any Vendor the opportunity to correct defects in its quotation. But the State will allow corrections only if they do not result in an unfair advantage for the Vendor and it is in the State's best interest.

Requirements

This RFQ asks for responses and submissions from Vendors. While each criterion represents only a part of the total basis for a decision to award the contract to a Vendor, a failure by a

Vendor to make a required submission or meet a requirement will normally result in a rejection of that Vendor's quotation. The value assigned to each criterion is only a value used to determine which quotation is the most advantageous to the State in relation to the other quotations that the State received. It is not a basis for determining the importance of meeting any requirement to participate in the quotation process.

The evaluation process may consist of up to three distinct phases:

1. The procurement representative's initial review of all quotations for defects;
2. The evaluation committee's evaluation of the quotations; and
3. Interviews (optional).

Initial Review

The procurement representative normally will reject any incomplete or incorrectly formatted quotation, though the procurement representative may elect to waive any defects or allow a Vendor to submit a correction. If a late quotation is rejected, the procurement representative will not open or evaluate the late quotations. The procurement representative will forward all timely, complete, and properly formatted quotations to an evaluation committee, which the procurement representative will chair.

Committee Review of the Quotations

The State's review committee will evaluate and numerically score each quotation that the procurement representative has forwarded to it.

The evaluation will result in a point total being calculated for each quotation. Those Vendors submitting the highest-rated quotations may be scheduled for the next phase. The number of quotations forwarded to the next phase will be within the committee's discretion, but regardless of the number of quotations selected for the next phase, they will always be the highest rated quotations from this phase.

At any time during this phase, the State may ask a Vendor to correct, revise, or clarify any portions of its quotation.

The State will document all major decisions in writing and make these a part of the file along with the evaluation results for each quotation considered.

Once the technical merits of a quotation are considered, the costs of that quotation will be considered. But the State may also consider costs before evaluating the technical merits of the quotations by doing an initial review of costs to determine if any quotations should be rejected because of excessive cost. And the State may reconsider the excessiveness of any quotation's cost at any time in the evaluation process.

Interviews

The State may record any presentations, demonstrations and interviews.

Determination of Responsibility

The State may review the highest-ranking Vendors or its key team members to ensure that the Vendor is responsible. The Contract may not be awarded to a Vendor that is determined to be not responsible. The State's determination of a Vendor's responsibility may include the following factors: the Vendor's and its key team members' experience, past conduct on previous Contracts, past performance on previous Contracts, ability to execute this contract properly and management skill. The State will make such determination of responsibility based on the Vendor's quotation, reference evaluations and any other information the State requests or determines to be relevant.

Changing Candidates

The major criterion on which the State bases the award of the contract is the quality of the Vendor's candidate(s). Changing personnel after the award may be a basis for termination of the contract.

Contract Award Process

It is OIT's intention to award one contract under the scope of this RFQ and as based on the RFQ Calendar of Events schedule, so long as OIT determines that doing so is in the State's best interests and OIT has not otherwise changed the award date. Any award decision by OIT under this RFQ is final. After OIT makes its decision under this RFQ, all Proposers will be notified in writing of the final evaluation and determination as to their quotes.

OIT anticipates making one award depending on program needs and the fit of the Proposer to the scope of this RFQ.

ATTACHMENT ONE

VENDOR PROFILE SUMMARY

VENDOR REFERENCES

Vendor's Name:

References. Provide three references for which the proposed candidate has successfully demonstrated meeting the requirements of the RFQ on projects of similar size and scope in the past five years. The name of the person to be contacted, phone number, company, address, brief description of project size and complexity, and date (month and year) of employment must be given for each reference. These references must be able to attest to the candidate's specific qualifications.

The reference given should be a person within the client's organization and not a co-worker or a contact within the offerors organization.

If less than three references are provided, the offeror must explain why. The State may disqualify the Quote if fewer than three references are given.

<table>
<tr><td>Client Company:</td><td>Client Contact Name:</td><td colspan="2">Client Contact Title:</td></tr>
<tr><td colspan="2">Client Address:</td><td colspan="2">Client Contact Phone Number:</td></tr>
<tr><td colspan="2">Project Name:</td><td>Beginning Date of Employment:
Month/Year</td><td>Ending Date of Employment:
Month/Year</td></tr>
<tr><td colspan="4">Description of services provided that are in line with those to be provided as part of this Project:

Description of how client project size and complexity are similar to this project:</td></tr>
</table>

ATTACHMENT ONE

VENDOR PROFILE SUMMARY

VENDOR REFERENCES CONTINUED

<table>
<tr><td>Client Company:</td><td>Client Contact Name:</td><td colspan="2">Client Contact Title:</td></tr>
<tr><td colspan="2">Client Address:</td><td colspan="2">Client Contact Phone Number:</td></tr>
<tr><td colspan="2">Project Name:</td><td>Beginning Date of Employment:
Month/Year</td><td>Ending Date of Employment:
Month/Year</td></tr>
<tr><td colspan="4">Description of services provided that are in line with those to be provided as part of this Project:

Description of how client project size and complexity are similar to this project:</td></tr>
</table>

<table>
<tr><td>Client Company:</td><td>Client Contact Name:</td><td colspan="2">Client Contact Title:</td></tr>
<tr><td colspan="2">Client Address:</td><td colspan="2">Client Contact Phone Number:</td></tr>
<tr><td colspan="2">Project Name:</td><td>Beginning Date of Employment:
Month/Year</td><td>Ending Date of Employment:
Month/Year</td></tr>
</table>

Description of services provided that are in line with those to be provided as part of this Project:

Description of how client project size and complexity are similar to this project:

ATTACHMENT TWO
PERSONNEL PROFILE SUMMARY
(Experience and Qualifications)

CANDIDATE REFERENCES

Candidate's Name:

References. Provide three references for which the proposed candidate has successfully demonstrated meeting the requirements of the RFQ on Works of similar size and scope in the past five years. The name of the person to be contacted, phone number, company, address, brief description of work size and complexity, and date (month and year) of employment must be given for each reference. These references must be able to attest to the candidate's specific qualifications.

The reference given should be a person within the client's organization and not a co-worker or a contact within the offerors organization.

If less than three references are provided, the offeror must explain why. The State may disqualify the Proposal if less than three references are given.

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

ATTACHMENT TWO

PERSONNEL PROFILE SUMMARY
(Experience and Qualifications)

CANDIDATE REFERENCES CONTINUED

Candidate's Name:

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

ATTACHMENT TWO

PERSONNEL PROFILE SUMMARY
(Experience and Qualifications)

CANDIDATE REFERENCES CONTINUED

Candidate's Name:

<table>
<tr><td>Client Company:</td><td>Client Contact Name:</td><td colspan="2">Client Contact Title:</td></tr>
<tr><td colspan="2">Client Address:</td><td colspan="2">Client Contact
Phone Number:
Email:</td></tr>
<tr><td colspan="2">Work Name:</td><td>Beginning Date of Employment:

Month/Year</td><td>Ending Date of Employment:

Month/Year</td></tr>
<tr><td colspan="4">Description of services provided that are in line with those to be provided as part of the Work:

Description of how client work size and complexity are similar to the Work:</td></tr>
</table>

ATTACHMENT TWO

PERSONNEL PROFILE SUMMARY
(Experience and Qualifications)
CANDIDATE EDUCATION AND TRAINING

Candidate's Name:

Education and Training. This section must be completed to list the education and training of each key candidate and must demonstrate in detail the key candidate's ability to properly execute the Contract based on the relevance of the education and training to the requirements of the RFQ.

EDUCATION AND TRAINING	MONTHS/ YEARS	WHERE OBTAINED	DEGREE/MAJOR YEAR EARNED
College			
Technical School			
Other Training			

ATTACHMENT THREE

COST SUMMARY

The Work	Cost
Work Plan and Schedule	**$**
Benchmark Survey	**$**
Identification of Performance Issues	**$**
Evaluation Against ITIL Frameworks	**$**
Recommendations for Practice Improvement	**$**
Plans to Initiate Continual Self-Improvement Processes	**$**
Transition Business Case	**$**
Total Not to Exceed Fixed Price	**$**