State of Ohio Enterprise Grants Management System Assessment

March 21, 2013

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

MINORITY BUSINESS ENTERPRISE (MBE) SET ASIDE

State Term Schedule

REQUEST FOR QUOTATION

DATE ISSUED: **3/21/2013**

RFQ #: **OITRFQ064**

The State of Ohio, through the Department of Administrative Services (DAS), Office of Information Technology (OIT) is requesting quotes for requirements definition and a business case related to the implementation of an Enterprise Grants Management System Assessment.

INQUIRY PERIOD BEGINS:	**04/03/2013**
INQUIRY PERIOD ENDS:	**04/09/2013**
OPENING DATE:	**04/15/2013**
OPENING LOCATION:	Department of Administrative Services Office of Information Technology Ohio Knowledge Administrative System (OAKS) 30 West Spring Street Level 12 Columbus, Ohio 43215

This RFQ consists of the following Parts and Attachments, totaling 20 consecutively numbered pages. Please verify that you have a complete copy.

PARTS

Overview	General Project Description
Part One	Statement of Work
Part Two	Administrative
Part Three	Evaluation Factors for Award
Part Four	Guidelines for Quotation Preparation

ATTACHMENTS

Attachment One	Candidate Reference Form
Attachment Two	Timeline
Attachment Three	Templates

OVERVIEW

The Department of Administrative Services (DAS), Office of Information Technology (OIT), Ohio Administrative Knowledge System (OAKS)**,** and the Office of Health Transformation (OHT) is issuing a Request for Quote (RFQ) for a qualified firm to provide resources to create a comprehensive list of system requirements and a business case regarding an Enterprise Grants Management System. The project is expected to last approximately twelve (12) weeks.

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.

The Governor's Office of Health Transformation (OHT) represents the Health and Human Services (HHS) agencies and is focused on providing the following service improvements for State of Ohio citizens:

1) Modernize Medicaid:
    - Improve care coordination
    - Integrate behavioral and physical health care
    - Rebalance long-term care

2) Streamline Health and Human Services:
    - Share services to increase efficiency
    - Right-size state and local service capacity
    - Streamline governance

3) Improve Health System Performance:
    - Get the right information in the right place at the right time
    - Make health care price and quality information transparent
    - Pay for value not volume

Here is the link to the OHT website for additional background information: http://www.healthtransformation.ohio.gov/.

BACKGROUND

The State of Ohio does not have an enterprise grants management technology solution that accounts for the entire end-to-end grants process for both agencies receiving grants and from grantor agencies to recipient agencies and sub-recipients. The PeopleSoft grants management modules were evaluated during Release 6 of OAKS and could not meet both the grantee and grantor requirements of the State.

Harry Kamdar, who is a member of the OAKS Internal Business Advisory Committee (IBAC) and the CFO of the Department of Health, has organized a group of agencies to evaluate enterprise grants management requirements on behalf of the State. This group, the Enterprise Grants Software Solution (EGSS) is made up of the following agencies:

- Bureau of Workers' Compensation
- Department of Aging
- Department of Commerce
- Department of Development Disabilities
- Department of Education
- Department of Health
- Department of Mental Health
- Department of Natural Resources
- Department of Public Safety
- Department of Rehabilitation and Corrections
- Department of Youth Services
- Development Services Agency
- Office of Budget and Management
- Ohio Department of Jobs and Family Services
- Environmental Protection Agency
- Ohio Rehabilitation Services Commission

Currently, agencies are using multiple methods for managing grants. The results of a survey conducted in September of 2012 revealed the following:

Method	%	Agencies Reporting
Commercial off the shelf (COTS)	11.80%	4
Custom built system	47.10%	16
Excel	79.40%	27
Access Database	26.50%	9
Cognos	55.90%	19
Other	11.80%	4
Total	**100.00%**	**79**

The project itself is broken down into the following components:

- **Requirements Definition**- the contractor will facilitate focus groups, utilizing the EGSS group and other State SMEs, to document enterprise grants management requirements. The requirements should represent the functional, reporting, and technical needs of the HHS, non-HHS, grantor, and grantee agencies. The requirements will be documented in the Requirements Traceability Matrix (RTM) deliverable. The State will provide the RTM template.

  Below is a listing of the cabinet level agencies:
  - Adjutant General's Department
  - Bureau of Workers' Compensation
  - Department of Administrative Services
  - Department of Aging
  - Department of Agriculture
  - Department of Alcohol and Drug Addiction Services
  - Department of Commerce
  - Department of Development
  - Department of Developmental Disabilities
  - Department of Health
  - Department of Insurance
  - Department of Jobs and Family Services
  - Department of Mental Health
  - Department of Natural Resources
  - Department of Public Safety
  - Department of Rehabilitation and Correction
  - Department of Taxation
  - Department of Transportation
  - Department of Veteran Services
  - Department of Youth Services
  - Office of Budget and Management
  - Office of Health Transformation
  - Ohio Environmental Protection Agency
  - Public Utilities Commission
  - Regents

  Note: Beginning July 1st, there will be a new agency, the Department of Medicaid. Also, the Department of Mental Health and the Department of Alcohol and Drug Addiction will be consolidated into a single agency—the Department of Mental Health and Addiction Services.

  Re-engineered and standardized business processes must be utilized. Requirements and /or business processes that are specific to individual agencies will not be approved or implemented with the enterprise solution. For example, the reporting requirements will capture the enterprise reporting requirements to meet the needs of all agencies. Agency specific reporting requirements that provide no benefit to the enterprise will not be approved and / or implemented. For example, if agencies are utilizing OAKS chartfields in a non-standard way as a part of the way they currently do business; that process will be retired.

In the to-be business process flow, all participating agencies will utilize OAKS chartfields in a standard and consistent way. The goal is that all participating agencies are utilizing a single enterprise wide standard business process that incorporate best practices.

Another example would be the process of for grant reconciliation. When the enterprise grants management application is implemented the grant reconciliation process must be standardized.

- **Software Evaluation** - the contractor will evaluate software that can meet the comprehensive enterprise requirements defined in the RTM. The software evaluation should consider a minimum of three alternative solutions. A solution may contain multiple software components. For example, if a combination of PeopleSoft and another software package are needed to fulfill the requirements then that combination should be considered one solution.

  Although the majority of the OAKS platform is based upon a PeopleSoft platform the grants management solution does not need to be PeopleSoft based. However, it must integrate to OAKS as defined in the RTM.

  Additionally, the recommended software solution must be a proven in the public sector. Preferably, the recommended solution has been implemented as a statewide enterprise grants management solution.

  Finally, the contractor will need to provide a Software Evaluation template which will need to be approved by the State prior to work beginning on the software evaluation.

- **Enterprise Grants Management Business Case** - the contractor will document the recommendations for an enterprise Grants Management system. The Business Case will define the existing grants management landscape in the state, a proposed solution, high level as-is and to-be business process flow, benefits / value, costs, risk and issues, impacts, dependencies of the solution, along with the recommended implementation plan.

  The State will provide the Business Case template.

TECHNICAL

The table below provides a list of the existing OAKS PeopleSoft application and PeopleTools versions that are currently live applications.

Note: The current plan is that the FIN application will be upgraded to application version 9.2 and PeopleTools version 8.53 in FY14.

OAKS Application	PeopleTools Version
Customer Relationship Management (CRM) 9.0	8.49.12
Enterprise Learning Management (ELM) 9.0	8.49.12
Enterprise Performance Management (EPM) 8.9	8.46.05
Enterprise Performance Management (EPM) 9.0	8.50.13
Enterprise Performance Management (EPM) 9.1	8.51.09
Financial and Supply Chain Management (FIN) 8.8	8.46.05
Financial and Supply Chain Management (FIN) 9.2	8.53
Human Capital Management (HCM) 9.1	8.51.09
Enterprise Portal 9.1	8.51.12

Deliverables

The Enterprise Grants Management System Assessment deliverables include, but are not limited to, the following:

1) Project Work Plan
2) Requirements Traceability Matrix
3) Software Evaluation
4) Business Case

The Contractor may suggest modifications to the deliverables list but the State must agree to any changes.

The State is looking for Contractor assistance to create the deliverables list above. The Contractor should have expertise in implementing best practices utilized in the public sector, specifically within state government, related to implementing grants related business processes. Previous experience with OAKS and / Stare of Ohio grants management processes are also preferable.

The tasks described below document the State's view of the minimum set of activities, deliverables and milestones required to successfully deliver the Enterprise Grants Management System Assessment project. The Contractor must include any additional considerations that would increase the overall probability of success and result in a high quality of delivery.

1.3 Schedule

The State believes that this project will take approximately twelve (12) weeks to execute. The Contractor must define the project schedule based upon the requirements defined in the RFQ.

1.4 Contractor Requirements

The State will provide oversight for the Project, but the Contractor must provide overall Project Management, along with some business analysis tasks for the Work under this Contract, including the day-to-day management of its staff. Additionally, the Contractor must provide all administrative support for its staff and activities. The Contractor must adhere to the Project schedule, once agreed upon by the State, and complete status reporting in a State approved format.

The Contractor must adhere to the following meeting and reporting requirements:

- Immediate Reporting - The Project Manager or a designee must immediately report any staffing changes for the Project to the Project Representative.
- Attend Status Meetings **-** Project team members must attend status meetings with the Project Representative and other people deemed necessary to discuss Project issues. The Project Representative will schedule these meetings, which will follow an agreed upon agenda and allow the Contractor and the State to discuss any issues that concern them.
- Prepare Weekly Status Reports - During the Project, the Contractor must submit a written weekly status report to the Project Representative on a mutually agreed upon day. The weekly status reports must adhere to the State's format and contain the following:
    - A description of the overall completion status of the Project in terms of the approved Project Plan (schedule and cost)
    - Updated Project schedule
    - The plans for activities scheduled for the next week
    - The status of any Deliverables
    - A risk analysis of actual and perceived problems
- Attend Monthly Executive Leadership Meetings – The State and Contractor Project managers must facilitate and attend Monthly Executive Leadership status meetings with the State sponsors for the project. The State Project Representative will schedule these meetings, which will follow an agreed upon agenda and allow the Contractor and the State to discuss status and provide an escalate path for issues.

The Contractor must:

- Utilize the State's SharePoint site to maintain all project related documentation and deliverables.
- At the conclusion of the Project, promptly provide State personnel with machine readable and comprehensive backup copies of the information which is owned by the State and not proprietary to the Contractor or otherwise required by the State to maintain ongoing Project documentation and artifacts.
- Have expertise in implementing best practices utilized in the public sector, specifically within state government, related to implementing grants management business processes.

The State will provide Contractor work space at the William Green Building located 30 West Spring Street, Columbus, Ohio 43215 for the duration of the Project. The William Green Building operating hours are from 7:30 a.m. to 6:00 p.m. Monday through Friday except for State holidays with core working hours from 9:00 a.m. to 4:00 p.m. The State will provide Internet connection and printer access. The Contractor will be required to provide laptops for their staff.

Although the State will provide Contractor work space at the William Green Building it is likely that the contractor will need to travel to the DAS General Services Division located at 4200 Surface Road, Columbus, Ohio 43228, the Ohio Shared Services (OSS) Center located at 4310 E. Fifth Avenue, Columbus, Ohio 43219, the Rhodes State Office Tower located at 30 E. Broad Street, Columbus, Ohio 43215, and other Columbus area locations to conduct focus group sessions with the EGSS group and other SMEs.

ACTIVITIES AND SEQUENCING

The table below details the key tasks for the Enterprise Grants Management System Assessment. It also identifies who has primary responsibility for completion of the tasks.

P: Primary responsible party**, S:** Secondary responsible party

#	Key Tasks	State	Contractor
1	Manage Contractor Project Staff	S	P
2	Manage State Project Staff	P	S
3	Provide conference rooms for interviews with business owners, agencies, and / or vendors	P	-
4	Schedules interviews with the EGSS group, SMEs and / or software vendors	P	-
5	Responsible for drafting and distributing project communications to agencies and vendors	P	-
6	Provides template for project kickoff meeting	P	S
7	Creates deck for project kickoff meeting	S	P
8	Facilitates project kickoff meeting	S	P
9	Create and maintain Enterprise Grants Management System Assessment Project Plan	S	P
10	Approve Enterprise Grants Management System Assessment Project Plan	P	S
11	Create weekly Project Status Reports	S	P
12	Participates in weekly Project Status meetings	S	P
13	Creates materials for Executive Leadership meetings	P	S
14	Participates in monthly Executive Leadership meetings	P	S
15	Report and Manage Issues and Risks	S	P

#	Key Tasks	State	Contractor
16	Creates Enterprise Grants Management System Assessment RTM	-	P
17	Approve Enterprise Grants Management System Assessment RTM	P	-
18	Conducts, facilitates, and documents EGSS, SME, and software vendor interviews to support project requirements and associated deliverables for the Enterprise Grants Management System Assessment project	S	P
19	Review deliverables and manage the State's approvals	P	S
20	Creates Enterprise Grants Management System Assessment Software Evaluation	-	P
21	Approve Enterprise Grants Management System Assessment Software Evaluation	P	-
22	Create updated Enterprise Grants Management System Assessment Business case	S	P
23	Approve updated Enterprise Grants Management System Assessment Business case	P	-

DELIVERABLES

Submittal of Deliverables

The Contractor must perform its tasks in a timely and professional manner that produces Deliverables that fully meet the contract's requirements. And the Contractor must provide the Deliverables no later than the due dates the Contract requires. At the time of delivery of a written Deliverable, the Contractor must submit an original and one copy of each Deliverable, plus an electronic copy. The Contractor must provide the electronic copy in a file format acceptable to the State.

By submitting a Deliverable, the Contractor represents that, to the best of its knowledge, it has performed the associated tasks in a manner that meets the Contract's requirements.

The Contractor's Fees Structure

The following describes the Project deliverables and what the Contractor must do to complete the Project satisfactorily. It also describes what the Offeror must deliver as part of the completed Project (the "Deliverables"). Note that the 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.

#	Deliverable Name	Deliverable Description	STS Cost Per Deliverable
1	Project Work Plan	Documents all of the activities, deliverables, and milestones required to complete the ELM Project. Documents might include but are not limited to the following: A. Work breakdown structure B. Schedules C. Resource needs D. Roles and responsibilities E. Key milestones F. Dependencies	
2	Updated Requirements Traceability Matrix (RTM)	List of the requirements for the processes that the Enterprise Grants Management system must meet for both grantee and grantor agencies users. Re-engineered and standardized business processes must be utilized. Requirements and /or business processes that are specific to individual agencies will not be approved or implemented with the enterprise solution.	

#	Deliverable Name	Deliverable Description	STS Cost Per Deliverable
3	Software Evaluation	The contractor will evaluate software that can meet the comprehensive enterprise requirements defined in the RTM. The software evaluation should consider a minimum of three alternative solutions. A solution may contain multiple software components. For example, if a combination of PeopleSoft and another software package are needed to fulfill the requirements then that combination should be considered one solution. Although the majority of the OAKS platform is based upon a PeopleSoft platform the grants management solution does not need to be PeopleSoft based. However, it will need to integrate to OAKS as defined in the RTM. Additionally, the recommended software solution must be a proven in the public sector. Preferably, the recommended solution has been implemented as a statewide enterprise grants management solution. The contractor will need to provide a Software Evaluation template which will need to be approved by the State prior to work beginning on the software evaluation.	

#	Deliverable Name	Deliverable Description	STS Cost Per Deliverable
4	Business Case	Creation of a business case for the Enterprise Grants Management system based on the requirements documents. The business case will leverage the benefits documented in the RTM and utilizing the software options documented in the Software Evaluation deliverable. The Business Case will define the existing grants management landscape in the state, a proposed solution, high level as-is and to-be business process flow, benefits / value, costs, risk and issues, impacts, dependencies, and the recommended implementation plan of the solution. Regarding the to-be process flow documentation, the process flow must incorporate re-engineered and standardized business processes must be utilized which leverage best practices. Business processes that are specific to individual agencies will not be included in the to-be process flow. The State will provide the Business Case template.	

Roles & Responsibilities

State Staff:

Role ID	State Role	Role Activity	FT / PT
1	Project Sponsors	▪ Provide input for development of strategic objectives, potential initiatives, and anticipated benefits ▪ Provide input on key Project decisions ▪ Interpret current state policies and provide guidance on potential policy updates ▪ Support Project deliverables approvals	PT
2	Project Manager	▪ Provide direction to State resources ▪ Review and approve deliverables ▪ Communicate with Project Sponsors ▪ Provides leadership and management of the Project ▪ Oversees daily Project activities including budget and schedule management ▪ Serve as the point of contact to coordinate the activities with the State functional Subject Matter Experts (SMEs) ▪ Monitors the status of the project, and takes any steps necessary to re-direct priorities, re-define the project organization, and / or adjust the work plan toward a successful completion of the project. Participates in the development of a communication strategy and is responsible for the delivery and dissemination of Project communication and statuses ▪ Provide guidance to State and Accenture Project resources and oversee development of Project deliverables	PT
3	OAKS Finance Service Owner	▪ Provide information on current FIN system, support and usage ▪ Provides PeopleSoft Financials (FIN) expertise and knowledge ▪ Support development of Project deliverables	PT
4	OBM Value Management Office (VMO)	▪ Provides input into the documented benefits associated with the FIN upgrade recommendations	PT
5	Grants Management SMEs	▪ Provide information on current agency Grants systems, support and usage ▪ Provides input to the Enterprise Grants Management requirements ▪ Support development of Project deliverables	PT

ADMINISTRATIVE

PROPOSAL 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 proposal 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
    - 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
    - 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 April 9, 2013. 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 04/15/13. 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	April 3, 2013
2. Questions from Vendors due	8:00 a.m., April 9, 2013
3. Responses to Vendors due	4:00 p.m., April 11, 2013
4. Proposal/Quotation Due Date	1:00 p.m., April 15, 2013
5. Target Date for Review of Proposal/Quotation	April 16, 2013 – April 18, 2013
6. Interviews of Candidates/Demos/Follow-up if needed	April 19, 2013 – April 24, 2013
7. Anticipated decision and selection of Vendor	April 26, 2013
8. Anticipated commencement date of work	On or after April 29, 2013

EVALUATION FACTORS FOR AWARD

EVALUATION

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

- Relevant experience
- Relevant skill level
- Proposed contractor rate(s)

Weight	Criteria
30%	An assessment of the Vendor's ability to deliver the stated deliverables in accordance with the specifications set out in this RFQ.
30%	Availability of sufficient high quality Vendor personnel with the required skills and experience for the specific approach proposed.
20%	The Vendor's stability, experiences, and record of past performance in delivering such services.
15%	Best Overall Cost
5%	MBE Vendor
100%	

The contractor will not be permitted to substitute personnel for those submitted for RFQ evaluation (during the RFQ evaluation or at project start-up), except when a candidate's unavailability is no fault of the contractor (e.g., Candidate is no longer employed by the Contractor, is deceased, etc.). Note: If a substitution situation occurs, the proposal will be

re-evaluated. If the substitution gives the contractor an unfair advantage during the RFQ process, the proposal may be eliminated or the other vendors will also be given the chance to submit substitutions of personnel also.

All proposals will be evaluated for meeting the requested information. Incomplete proposals will not be reviewed. The proposals that provided the requested information will be evaluated for at least the highest prioritized candidate. The proposals will be scored based on the criteria requested above. We reserve the option to interview the top candidates. Candidate substitutions between the proposal evaluation and interview periods are highly discouraged (see above). If OIT has other qualified candidates, the contractor's proposal requesting a substitution will be denied at this stage and the proposal will be eliminated from evaluation. If OIT does not have enough qualified candidates due to the substitution, all received proposals will be asked to confirm their candidates, given a couple of days to provide replacements, and the entire process will start over.

TERM AND CONTRACT

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

STATUS REPORTING

The contractor will provide weekly status reports to the State OIT. The contractor will be responsible for meeting all timelines designated by assigned Project manager. Weekly timesheets will be reviewed and signed by the OIT Project Manager. Invoices must be accompanied by timesheets and submitted monthly for payment.

NON-DISCLOSURE AGREEMENT

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

GUIDELINES FOR QUOTATION PREPARATION

Quotation Submittal

Each Vendor must submit three (3) complete, sealed and signed copies of its quotation and each quotation must be clearly marked "Enterprise Grants Management System Assessment" 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 proposal must be organized in the same format as described below. Any material deviation from the format outlined below may result in a rejection of the non-conforming proposal. Each proposal must contain an identifiable tab sheet preceding each section of the proposal. Quote should be good for a minimum of 45 days.

- Cover Letter (include phone and e-mail contact)
- MBE Certification
- State Term Schedule Number
- STS Labor Category Code
- Vendor Information:

  - Vendor References (3 minimum) - form
  - Vendor Resume
  - Additional Vendor Information (optional) – vendor form
- Deliverables
- Deliverables Cost & STS Rate
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance, including workers' compensation
- W-9 Form

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

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

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

PROPRIETARY INFORMATION

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

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

WAIVER OF DEFECTS

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

REJECTION OF QUOTATIONS

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

EVALUATION OF QUOTATIONS

Clarifications and Corrections

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

Requirements

This RFQ asks for responses and submissions from Vendors. While each criterion represents only a part of the total basis for a decision to award the contract to a Vendor, a failure by a Vendor to make a required submission or meet a requirement will normally result in a rejection of that Vendor's quotation. The value assigned to each criterion is only a value used to determine which quotation is the most advantageous to the State in relation to the other quotations that the State received. It is not a basis for determining the importance of meeting any requirement to participate in the quotation process.

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

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

Initial Review

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

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 proposals.

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 Proposal if fewer than three references are given.

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

ATTACHMENT ONE

VENDOR PROFILE SUMMARY

VENDOR REFERENCES CONTINUED

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

ATTACHMENT ONE

VENDOR PROFILE SUMMARY

VENDOR REFERENCES CONTINUED

Client Company:	**Client Contact Name:**	**Client Contact Title:**	
Client Address:		**Client Contact Phone Number:**	
Project Name:		**Beginning Date of Employment:** **Month/Year**	**Ending Date of Employment:** **Month/Year**
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:**			