



Business Process Analysis,
Project Management, and
Microsoft .NET
Training Matrix and Classes

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

M I N O R I T Y B U S I N E S S E N T E R P R I S E (M B E)

S E T A S I D E

State Term Schedule

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INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR QUOTATION

This Request for Quote (RFQ) has been put together in collaboration between the Department of Administrative Services (DAS), Human Resource Division Office of Learning and Professional Development (OLPD) and Office of Information Technology (OIT) Project Success Center (PSC). The intent is to outline training requirements for various stakeholders throughout the state, with a goal of increasing Business Process Analysis (BPA), Project Management (PM), and Microsoft .NET software development capabilities across the state. The Office of Learning and Professional Development and the Project Success Center would like to provide a training matrix as a guide to employees looking to enter into or expand their abilities within these disciplines. Secondly, DAS is interested in discounted training classes on some of the suggested class requirements from the training matrix for a minimum of 4 classes and up to a maximum of 15 classes from the awarded vendor and filling those classes with state employees (12-20 attendees based on the specific class). Each class should have at least a maximum capacity of 25 participants for BPA and PM training and 15 for Microsoft .NET. The classes will be held during the state fiscal year 2015 (7/1/14-6/30/15). This RFQ is an MBE set aside.

Vendors are welcome to offer up alternative solutions to those outlined here as long as they meet the intended outcomes and requirements.

REQUIREMENTS

Business Process Analyst (BPA), Project Management (PM), Microsoft .NET Software Development Training Matrix: The training matrix would consist of defining high level sets of requirements for the types of classes the target audiences should consider, based on their level of experience or engagement. The training matrix requirements do not need to be limited to only one potential target audience (overlaps are acceptable). The class requirements should be generic so that target audience could obtain the training through multiple avenues (Online training, vendor offered training, state offered training, etc.). The matrix would then map each of the target audiences to suggested training classes (based on class requirements, not vendor specific classes or requirements).

Note: The state offers IT employees' access to Learn IT Ohio, which is based on Skill Port, and offers many online training opportunities. Vendor should consider this when developing the training matrix.

Description of target audiences (note: position descriptions come from State of Ohio classifications series, class concepts for BPAs , PMs and Software Development Specialist (SDS):

BPA

BPA Interested-People interested in pursuing a career in Business Process Analysis (BPA), but currently are not performing Business Process Analysis work.

BPA1-The first level class possesses working knowledge of business process analysis methods and under immediate supervision receives instruction/training in user & technical documentation, project and resource planning in order to synthesize

organizational and project information, facilitate stakeholder and participant communications and relationships, and accomplish project planning activities for implementation of information technology solutions.

BPA2-The second level class possesses considerable knowledge of business process analysis methods and techniques and receives general supervision in order to create and coordinate technical documentation preparation and distribution for processes, projects and procedures, works with business users and technical staff to develop strategies and lead the modification or creation of new systems for implementation of information technology solutions.

BPA3-The advanced level class requires a thorough knowledge of business process analysis and systems development lifecycles and receives general direction in order to lead analysts and analyze business operations to determine areas to implement solutions through the use of information technology and reduce overall costs and/or provide efficiencies.

PM

PM Interested-People interested in pursuing a career in project management, but currently are not performing project management duties.

PM1-The first managerial level class works under direction & requires considerable knowledge of project management, life cycle methodologies & public policy management or public administration in order to manage project(s), with or without sub-projects, that covers all phases of project management, with activities & responsibilities resting primarily within one given office/program of assigned agency & whose primary stakeholders are management, staff &/or end users, direct delivery (i.e. does not require direct involvement of, but may be overseen by, higher-level authority of agency executives &/or political group) to end user/client (e.g., agency employees, outside agency, public customer) for operation/use, focus on testing, monitoring & modification of delivery to end user & direct, implement & monitor policy & ensure compliance.

PM2-The second managerial level class works under direction & requires thorough knowledge of project management, life cycle methodologies & public policy management or public administration in order to manage project(s), with or without sub-projects, that covers all phases of project management, with activities & responsibilities involving organizations/entities external to assigned agency, whose primary stakeholders are executives &/or local (e.g., county, city) political organizations/individuals, work directly with agency executives & organizations responsible for service/product delivery, focus on coordination of projects with other services/projects, direct, implement & monitor policy & ensure compliance, & market benefits to organizations/executive management.

PM3-The third managerial level class works under direction & requires extensive knowledge of project management, life cycle methodologies & public policy management or public administration in order to direct project(s), with or without sub-projects, that covers all phases of project management & whose primary stakeholders are executives &/or state/federal political organizations/individuals, work directly with

agency executives, focus on strategic planning of federal/state mandated projects, coordinate projects with other services/projects, write, implement & monitor policy & ensure compliance, market benefits to organization/executive management, & lobby political entities.

IT PM and IT BPA-There is additional training recommended for BPAs and PMs working in information technology. Examples of this type of training may be things like Agile Project Management or ITIL.

Project Team Member: project team members may want to consider taking classes to help them understand processes being used during projects.

Project Executives: For project sponsors or someone who manages project managers and/or business process analysts.

Microsoft .NET Software Development Curriculum

Entry level Software Developer Specialist 1

People interested in pursuing a as a SDS in Microsoft .NET software development (SDS), but currently are not performing software development work. Most will have a core undergraduate program in Computer Science or Information Systems or equivalent work experience. This series of classes will prepare students to possess a working technical knowledge of Microsoft .NET software development to develop and/or modify programs for .NET applications, perform testing and debugging and assist with analysis and design.

Deliverables:

- Training Matrixes for BPA/PM and .NET (2 deliverables):
 - A combined (Business Process Analysis and Project Management) matrix and a standalone matrix for Microsoft .NET Software Development identifying target audiences, recommended class requirements (in the form of class content recommendations and not vendor specific training).
 - Specific linkages between classification descriptions and the course requirements associated with them.
- Marketing materials related to raising awareness of the training matrixes, purpose, recommendations for getting training for both BPA/PM and .NET (2 deliverables).

TRAINING CLASSES

Once the training matrices are produced and accepted, the awarded vendor will work with OLPD and PSC to select a minimum of 4 classes and a maximum of 15 classes in which the state will solicit participants and fill the class with a minimum of 15 students and a maximum of 25 for BPA and PM training and 12-15 for Microsoft .NET training. For quoting the class, we ask vendors to base costs on 20 students for BPA and PM classes and 12 for .NET classes, regardless of actual number of attendees. OLPD will be responsible marketing the classes, to receiving class RSVPs and communications with state employees. The vendor would be responsible for working with OLPD and PSC on selecting classes, instructor, and class material. Please quote two separate ways: one for vendor providing training location and another for state providing

training location, assuming the state location can meet class requirements (PCs, Internet access, etc.).

The Microsoft .NET training series will include introductory courses in general software programming in an object oriented environment, introduction to HTML, database systems theory and application. Additional topics of interest can include JavaScript libraries (jQuery), Service Oriented Library (SoA), and security.

This series of classes must also contain content to prepare students to sit for the associated Microsoft certifications for:

1. Programming in HTML5 with JavaScript and CSS3
2. Developing ASP.NET MVC 4 Web Services
3. Developing Windows Azure and Web Services

DAS is interested in discounted classes from the awarded vendor in a variety of possible classes for BPA and PM. For .NET the state is interested in the specific class topics outlined above. For the purposes of evaluating this RFQ, DAS request vendors to propose their specific classes for BPA and PM (introduction/boot camp) and also provide a list of course the vendor is able to provide in this knowledge area. The list of class offerings should include the discounted prices being proposed based on STS contract.

ADMINISTRATIVE

PROPOSAL INQUIRIES

Vendors may make inquiries regarding this RFQ at any time during the inquiry period specified within the schedule events, which is detailed within this section. 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 "OIT").
- 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 September 26, 2014. 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 October 9, 2014. 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 are Eastern Standard Time (EST).

Event	Date
1. RFQ Distribution to Vendors	September 22, 2014
3. Questions from Vendors due	8:00 a.m., September 26, 2014
4. Responses to Vendors due	4:00 p.m., October 1, 2014
5. Proposal/Quotation Due Date	1:00 p.m., October 9, 2014
6. Target Date for Review of Proposal/Quotation	October 10, 2014
7. Proposal Review meeting, if needed	October 13-16, 2014
8. Anticipated decision and selection of Vendor	October 17, 2014
9. Anticipated commencement date of work	November 1, 2014

MBE ONLY

Background: The State is committed to making more State contracts and opportunities available to minority business enterprises (MBE) certified by the Ohio Department of Administrative Services (DAS) pursuant to Section 123.151 of the Ohio Revised Code and Rule 123:2-15-01 of the Ohio Administrative Code. This Request for Quote (RFQ) is being issued as a minority set-aside contract in accordance Section 125.081 of the Ohio Revised Code. All vendors must be an Ohio certified MBE as of the proposal due date. For more information regarding Ohio MBE certification requirements, including a list of Ohio certified MBE businesses, please visit the DAS Equal Opportunity Division web site at:

<http://das.ohio.gov/Divisions/EqualOpportunity/MBEEDGECertification/tabid/134/default.aspx>

MBE Certification: Any vendors seeking to submit a proposal must be an Ohio certified MBE as of the proposal due date, be in good standing, and must provide a copy of its Ohio MBE certification with its proposal. Vendors must maintain a valid certification throughout the term of the Contract, including any renewals. Failure to maintain a valid certification will be considered a breach of the Contract.

Mandatory Requirements: Subcontractors, including non-MBEs, are permitted to meet the mandatory requirements of the Contract.

Work: The awarded Contractor must perform at least thirty (30) percent of the Work under the Contract

EVALUATION

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

- Vendor's approach to developing the training matrixes
- Vendor's experience in creating matrixes/curriculum for other large clients
- Vendors ability to develop the training matrixes (the state's assumption is vendors with training programs should already have most of the class requirements)
- Vendor's classes that they have available in these skill sets and experience of instructors.
- Overall cohesiveness of the proposed package
- Price of developing matrixes
- Discounted class offerings

For Training Matrix: Vendors should provide in their proposal their approach and expertise to accomplish: building the training matrix, producing marketing materials for the training matrix (without vendor specific logos) that DAS could use to make people aware of the training matrix. The quote for the training matrix should be based on a fixed deliverable (not time and material

based, however, fixed deliverable should be based on STS rates and show how those rates were used to determine fixed deliverable cost). Examples are not required, but are welcome.

For Training Classes provide recommend core classes for BPA and PM (boot camp / introductory) and for Microsoft .NET provide a class meeting requirements above in the form of the following:

- Instructors for proposed classes
- Class materials proposed classes
- Cost of class (assumed discounted based on RFQ intent and requirements) based on 20 participants for BPA and PM classes and 12 for Microsoft .NET classes, the state will commit to having 15-25 in the BPA and PM class and 12-15 in .NET classes. We realize we have not committed to which classes at this time for BPA and PM, so vendor should speak to a discounted rate for classes meeting training matrix requirements.
- Separate cost for providing facilities (the state may elect to use their own facilities if they can meet the needs of the class being taught).

Note: DAS may elect to not do these classes, if the vendor is not significantly below what could be procured in the open market.

All proposals will be evaluated for meeting the requested information. Incomplete proposals will not be reviewed. The proposals will be scored based on the criteria requested above. We reserve the option to have proposal meetings with vendors to better understand their proposals.

TERM AND CONTRACT

- The contract will be for **Fixed Deliverable** through State Term Schedule (STS) contract and must reflect or be lower than STS rates, and must use STS categories for the rates determining the fixed deliverable cost. Provide a cost sheet of how the fixed deliverable costs was derived, based on STS rates.
- The term will be until June 30, 2015.
- Only qualified MBE vendors are invited to participate.
- The development of the matrix will be developed off site from the state. The state will work with awarded vendor for any necessary meetings and coordination activities.
- No additional costs, such as travel, meals, lodging, taxes, parking or other associated costs may be charged separately for this work. The vendor's sole compensation for the duties described herein shall be the billings at the vendor's hourly rate.

Work performed to create the training matrix by the vendor shall be deemed a "work-for-hire," and shall be the sole property of the State of Ohio.

STATUS REPORTING

The contractor will provide weekly status reports or regular update meetings to DAS for the development of training matrixes and during the planning and execution of any classes. Payments will be made for the approval of the training matrix and upon completion of classes.

NON-DISCLOSURE AGREEMENT

Both candidate(s) and company will be required to sign a non-disclosure agreement. The agreement prevents the 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

The Vendor's response shall clearly demonstrate how their proposal meets the requirements outlined in this RFQ. **An electronic copy of the complete quotation must be submitted in PDF Format ONLY** in the order listed below. Electronic submissions should be on a CD, DVD or USB memory stick. ***One (1) PRINTED COPY MUST BE SUBMITTED WITHOUT STAPLES.*** Optionally the Vendor may provide extra printed copies of their proposal, but no more than three (3). Each proposal must contain the following items: The proposal shall be good for a minimum of 45 days.

- Cover Letter (include email address)
- MBE Certification
- State Term Schedule Number
- STS Labor Category Code
- Company profile (history, past & current clients)
- Proposal (addressing items described under requirements)
- Candidate Information:
 - Position References – see Attachment 1
 - Candidate Resume
- Class references
- Deliverable quotes for fixed deliverables, based on STS rates:
 - Development of matrix
 - Classes:
 - Introduction to BPA class (State hosted and Vendor hosted)
 - Introduction to PM class (State hosted and Vendor hosted)
 - Microsoft .NET (State hosted and Vendor hosted)
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form

The State will not be liable for any costs incurred by any vendor 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 and Non-MBE 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 MBE 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. Proposal Review meetings (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.

Proposal Review Meetings (Optional)

The state may elect to have a proposal review meeting with vendors to better understand the proposal, to get questions answered and to meet resources who will be involved in the engagement. The state may elect to do this with the highest ranking proposals prior to final selection.

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.

Contract Award Process

It is DAS OIT's and OLPD'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 DAS determines that doing so is in the State's best interests and DAS has not otherwise changed the award date. Any award decision by DAS under this RFQ is final. After DAS makes its decision under this RFQ, all Proposers will be notified in writing of the final evaluation and determination as to their proposals.

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

ATTACHMENT ONE
PERSONNEL PROFILE SUMMARY
CANDIDATE REFERENCES

Candidate'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 vendors organization.

If less than three references are provided, the vendor 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
PERSONNEL PROFILE SUMMARY
CANDIDATE 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
<p>Description of services provided that are in line with those to be provided as part of this Project:</p> <p>Description of how client project size and complexity are similar to this project:</p>			

