NextGen eProcurement

Pre-Proposal Conference: RFP 0A1190 Overview

The Conference will begin momentarily.
Welcome and Introductions

- Spotlight on Project & Solution Elements
- State RFP Responses: General Processes and Protocols
- Open Inquiries: Questions & Answers
- Wrap-Up
On this Teleconference:

**Maria Johnson** – Procurement Representative/Moderator
Computer Acquisition Analyst

**Eric Glenn** – Business Owner/Presenter
Deputy Chief Procurement Officer

**Kelly Sanders** – Business Owner/Presenter
Chief Procurement Officer

**Bob Sievert** – Subject Matter Expert
eProcurement Practice Lead
Welcome and Introductions

Spotlight on Project & Solution Elements

- State RFP Responses: General Processes and Protocols
- Open Inquiries: Questions & Answers
- Wrap-Up
NextGen eProcurement: Background

Ohio Department of Administrative Services (DAS), Office of Procurement Services (OPS) provides general and information technology procurement services to its customers.

Procurement activities are a mix of centralized and decentralized practices, encompassing many entities.

The State is currently challenged with:

- Transactional inefficiencies;
- Higher costs for doing business; and
- A less than optimal user experience for buyers and suppliers.
NextGen eProcurement: Vision

The State seeks:

- A cloud-based, managed service with a strong interest in a Software as a Service (SaaS) Solution delivery model
- To encourage industry partnerships where necessary to bring a best-of-breed, innovative, integrated, and comprehensive Solution with the latest software available
- An adaptive and configurable Solution to accommodate the different needs of State Agencies and evolve as the State’s needs and legislative requirements change
- Deployment that will provide value early in the implementation
  - Focus on creating a broad deployment of the Open Marketplace Shopping Environment by December of 2018
NextGen eProcurement: Vision continued

The Solution is envisioned to be used by:

- Central Procurement
- State Agencies
- Higher Education Institutions
- Local Governments
- Suppliers
NextGen eProcurement: Key Success Factors

The desired eProcurement solution must empower the State to:

- Provide a simpler buying experience;
- Provide a single point of entry, status and reporting for all procurements;
- Establish and manage a unified set of processes for all procurements and stakeholders;
- Provide real-time dashboard and tracking capability;
- Increase supplier participation and competitiveness to support finding the best possible product/service at the best value-point; and
- Achieve standardization of policies, processes, and systems.
NextGen eProcurement: Key Success Factors

The State expects to achieve success and value early with focus on:

- Open Marketplace Shopping Environment deployment by December 2018
- Benefits Realization
- Organizational Change Management (OCM)
The RFP is organized into nine eProcurement Workstreams.
Functional Requirements

Response focal points:

- **Inline Narrative**: Supplement 1, Section 3.2
- **Requirements Matrix**: Supplement 1, Section 3.2 and Attachment 10

**Approach**: how and when (year 1, 2, or 3 of implementation) the requirement
Integration & Conversion Requirements

Response focal points:

- **Inline Narrative:** Supplement 1, Section 4.5
- **Requirements Matrix:** Supplement 1, Section 4.5 and Attachment 10

**Approach:** how and when (year 1, 2, or 3 of implementation) the requirement
Technical Environment

Enterprise tools and solutions available to leverage (Supplement 1, Section 4):

- State Portals
- Workflow & Integration Management
- Enterprise Identity Management

*Licenses required*

Existing State Systems & Dispositions (Supplement 1, Section 4.4)

- Replace
- Integrate Data & Process
- Link
- Convert/Migrate Data
Managed Services

- Open Marketplace Environment Services
  - Onboarding Supplier Support
  - On-going expansion efforts
- Help Desk Services
- Optional Procurement Services
Contractor Best Practices

Demonstrate commitment to continuous improvements

- On-going proposal of leading alternative practices, tools and services
- Discounts for potential future tools or service offerings
- 3-yr Product Roadmap
- Open to Advanced Technologies
  - Machine Learning
  - Artificial Intelligence
  - Digital Assistant technologies
Innovations and Value-Added Services

Option to propose additional innovations and value-added services

- Not already contemplated in this RFP
- Available within the implementation period of this Project
The scope of this Project is to foster broad use of the Solution to a variety of State Agencies, non-State entities, and Suppliers over time.

- Incremental Functional Release
- Not “big bang” but iterative and agile approach
- Looking for innovation
- Open to Roadmap
- Optional Scope Elements
Service Level Agreements (SLAs)

SLAs cover entire Project Lifecycle

- Project Implementation
  - Deliverable Quality
  - UAT

- Business & Managed Services
  - Catalog Onboarding/Maintenance Services
  - External Sources Onboarding Services

- Help Desk Services
• Welcome and Introductions
• Spotlight on Project & Solution Elements
• State RFP Responses: General Processes and Protocols
• Open Inquiries: Questions & Answers
• Wrap-Up
This section has been developed to assist Offerors unfamiliar with Ohio processes in responding to State RFPs:

<table>
<thead>
<tr>
<th>RFP Element</th>
<th>Items of Particular Focus</th>
</tr>
</thead>
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<tr>
<td>“Base RFP”</td>
<td><strong>Cover/Part 1: Key Dates</strong> (including due date), Summary of Procurement</td>
</tr>
<tr>
<td>Part 2:</td>
<td>Structure of this RFP</td>
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<tr>
<td>Part 3:</td>
<td>How to Respond and How to Ask Questions (Inquiry)</td>
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<td>Part 4:</td>
<td>Evaluation of Proposals</td>
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<td>Part 5:</td>
<td>How Contracts will be Issued</td>
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<td>Attachment One</td>
<td><strong>Mandatory Requirements and Specific Evaluation Criteria and Weighting</strong></td>
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<td>Attachment Two</td>
<td>Special Provisions</td>
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<tr>
<td>Attachment Three</td>
<td>Proposal Format (All 23 Items in List on Base RFP p25-23 must be included in response)</td>
</tr>
<tr>
<td>Attachment Four</td>
<td><strong>State Terms and Conditions</strong></td>
</tr>
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<td>Attachment Five</td>
<td>Sample Contract</td>
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<td>Attachment Six</td>
<td>Offeror Certification Form</td>
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<tr>
<td>Attachment Seven</td>
<td><strong>Offeror Profile Summary</strong> (Demonstrate Compliance with Mandatory Requirements)</td>
</tr>
<tr>
<td>Attachment Eight</td>
<td>Standard Affirmation and Disclosure Form (EO 2011-2012K) – prohibition on offshoring.</td>
</tr>
<tr>
<td>Attachment Nine</td>
<td><strong>Cost Summary Workbook</strong> – separately sealed package</td>
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<td>Attachment Ten</td>
<td>Functional and Integration Requirements</td>
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<td>Attachment Eleven</td>
<td>Master Contract for Software Licensing Agreement</td>
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<tr>
<td>Supplement 1</td>
<td><strong>Scope of Work</strong></td>
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<td>Supplement 2</td>
<td>State Architecture, Security, Privacy and Data Handling Requirements</td>
</tr>
<tr>
<td>Supplement 3</td>
<td>Reference Materials</td>
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</tbody>
</table>
This RFP has two Mandatory Requirements:

- The offeror or its subcontractor must have experience successfully implementing an eProcurement Suite through Production for at least one Federal, State, Local, or other governmental entity, Institution of Higher Education, Fortune 500 or Global Fortune 500 customer within the last 60 months.

- The offeror or its subcontractor must have experience successfully operating an eProcurement Suite as a managed or cloud service, including catalog content and related contracts, for at least one Federal, State, Local, or other governmental entity, Institution of Higher Education, Fortune 500 or Global Fortune 500 customer within the last 60 months.
Attachment 7 is where you “show how you meet the mandatory requirement” as well as “provide references”:

Offeror Advice:

Failure of an offeror to meet a Mandatory Requirement may result in your proposal not being evaluated.

- Responses must clearly address the requirement and uses the forms provided as Attachment 7
- Provide an Attachment 7 for each client or project you wish to have considered by the State – additional pages are fine.
- Use definitive and unambiguous language in responding with active verbs wherever possible (e.g., “successfully performed” vs. “assisted with” or “participated in”)
- Establish a linkage to any/all of the “NextGen eProcurement” defining terms

Don’t assume any knowledge or familiarity with your firm, reputation, use of internet resources by the State to assess your response – include everything required to demonstrate compliance to assist State evaluators in your Attachment 7 response.

Offerors are advised to read and understand the RFP in its entirety. This guide is an overview of, but not a replacement for State requirements in the RFP.
Ohio Preference Programs applicable to this RFP:

- Minority Business Enterprise (MBE),
- Encouraging Diversity, Growth and Equity (EDGE), and
- Veteran Friendly Business.

Commitment to minority-owned business enterprises:

- MBE set-aside
- Tied to Evaluation Points – 5%
Supplement 1

- Be clear, complete and concise
- No proprietary or confidential information should be included! All proposals submitted become open to public request after contract award
- Assumptions - No assumptions should be made regarding negotiations, terms and conditions, or requirements.

Proposal responses (Attachment 7 Forms)

- Offeror Profile Summary Forms are used to validate the mandatory requirements of this RFP
- Provide valid information for each Project referenced
- Include the Client Reference Contact
- Respond clearly to the qualifications and experience requested for each requirement
State Terminology 101:

The State uses the terms “Technical Proposal” and “Proposed Solution” to identify a “Proposal” to this RFP, the requirements of the State are contained in Supplement 1.

**Supplements** contain the State’s Requirements – this is where “Proposals” are made in long form (e.g., narrative, graphical etc)

**Offerors** are firms proposing work (pre-contract)

**Contractors** are firms performing work (post-contract)
How State Contracts are Assembled:

Signature Page, plus all elements of the Technical Proposal (inclusive of State Requirements and Offeror Response)

Technical Proposal (Attachment 3)
- Cover Letter
- Supplier Registration
- Subcontractor Letters
- Offeror Certification Form
- MBE Subcontractor Plan
- MBE Certification(s)
- Offeror Profile (as it relates to the proposed work)
- Profile Summary Forms
- Project Plan
- Proposed Solution – Supplement 1 Response
- Acceptance of Supplement 2 – State Architecture and Computing Standards, Security and Privacy, IT Computing Policy and Data Handling Requirements
- Proof of Insurance
- Payment Address
- Legal Notice Address
- W-9 Form
- Independent Contractor Acknowledgement
- Standard Affirmation and Disclosure Form (EO 2011-12K)
- Acceptance of Attachment Four: General Terms and Conditions
- Affirmative Action
- Assumptions
- Pre-existing Materials
- Commercial Materials
- Attachment Eleven: Master Contract for Software Licensing (if applicable)

Attachment 3 contains all elements and links to State required forms

Offerors are advised to read and understand the RFP in its entirety. This guide is an overview of, but not a replacement for State requirements in the RFP.
Technical Proposal: What does an “Inline” Response look like?

To streamline responses and contracting, the State utilizes an “inline response” format that includes:

- **State Requirements** (generally in black text)
- **Offeror Responses** (generally in contrasting text)

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Technical Proposal: What does an “Inline” Response look like?

Another illustrative example

Additionally, this RFP contains State Security, Privacy and Data Handling requirements in Supplement 2, all of which must be strictly adhered to as part of the response to this RFP and in the course of delivery of Services to the State.

**XYZ Corporation Response:** XYZ Corporation acknowledges this request to provide a real-time fraud detection and analysis solution. During the requirements phase, we will work with the State to determine the functional and technical requirements for real-time fraud detection and analysis. During the design phase, the functional and technical design will address the pilot applications, while the architecture and physical design will address availability and scalability requirements. During the build phase, the solution will be implemented according to the availability/redundancy and performance requirement. The solution will be built leveraging WidgetMaster 3000. After careful review of the requirements involving basic detection, advanced models and analytics, predictive modeling and machine learning, profiling, integration, case management, and reporting, we chose WidgetMaster 3000 because we believe they bring the leading capabilities to serve the requirements.

Our technical, analytics, and data science team will work with the State to identify, design, and build appropriate models for fraud detection and analysis. XYZ Corporation’s proposed fraud detection and analysis component will leverage WidgetMaster 3000. WidgetMaster 3000’s architecture allows grouping of constituents based on different parameters. This enables the State to identify the different constituents and their requirements. Detailed specifications surrounding the constituents will be gathered during the requirements phase so that the design, build, and testing can reflect them.

The solution will be built with data security in mind, using Federal Risk and Authorization Management Program (FedRAMP) standards allowing for analysis with appropriate black/white lists and auditing capabilities via appropriate integration. In addition, the solution’s continuous machine learning capabilities allow the State to integrate existing and other threat information (and data sources) to enable the solution to flag fraudulent transactions in real-time.

XYZ Corporation will work with the State to capture the requirements, and we will help design and build the Pilot leveraging the solution architecture depicted in Figure 6.

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Attachment 4: State Terms and Conditions & Other thoughts

State Terms and Conditions applies to this Procurement only

Attachment 4: Terms and Conditions

- The State does not negotiate Terms and Conditions via the Inquiry Process
- State Terms and Conditions for this Procurement may be different from other State contracts so all offerors are encouraged to review these Terms and Conditions carefully

Supplement 2: State Security, Privacy, Architecture and Data Handling

Contains State Data Handling, Security and Privacy requirements that are required by Offerors to Supplement 1.

A simple affirmational Statement is an acceptable response to Supplement 2 (e.g., “XYZ Corporation has read, understands and will comply with the requirements of Supplement 2 as applicable to the work we will perform for the State”)

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Attachment Nine: Cost Summary Workbook

The Cost Summary Workbook contains 11 worksheets:

1. Instructions
2. Workbook Summary View
3. Project & Managed Services
4. Cost by Workstream View
5. Bill of Materials
6. Rate Card
7. Innovation & Value-Added Services
8. Alternative Funding Models
9. Optional Rollout Costs
10. Optional Procurement Services
11. Contractor Best Practices

Offerors are advised to read and understand the RFP in its entirety. This guide is an overview of, but not a replacement for State requirements in the RFP.
Offeror Cost Proposal must be a separately sealed package, in native Excel format, not PDF.

The Cost Summary Workbook contains 11 worksheets:

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**NextGen eProcurement**

**RFP No. 0A1190 - Attachment 09 - Offeror Cost Workbook Instructions**

**Offeror:**

Date Proposed:

1. Please note this Cost Workbook contains ten (10) additional tabs that the offeror may use to indicate all costs associated with its proposal. No other costs will be considered for the proposal outside of this Cost Workbook.
2. The offeror must not reformat any part of this Workbook, any reformatting may be cause for rejection of the proposal.
3. The offeror must not populate or change the “shaded” cells in any rows or columns of the workbook as these cells contain formulas or are intended to be left blank.
4. The offeror is responsible for the accuracy of all the information provided in the Workbook.
5. The offeror may add (insert) rows for additional data (e.g. Project cost line items on Projects Costs tab, software license or maintenance costs on BOM tab, roles on Rate Card tab) as needed.
6. In the event that the unit cost on the BOM tab does not apply to the offeror’s pricing model, the offeror may provide a total cost (e.g. bundled or unlimited licenses).
7. The offeror must indicate the MBE cost included for each element of the offeror’s costs in the fields provided when applicable.

The Costs by Workstream View tab has been provided to allow the offeror to present their total Not-to-Exceed Fixed Price cost breakdowns for each Workstream of the Project. The cost for each Workstream must be inclusive of all costs associated with successfully implementing and deploying the Workstream (including project management and O&M) to all its pertinent users. The costs represented on the Costs by Workstream View is not in addition to the costs reflected on the Project and Managed Services tab; therefore, the Total Contract Cost for Project & Managed Services must match the Total Contract Cost for the Costs by Workstream.

If offeror has responded to any of the below optional sections of Supplement 1 the offeror must provide cost details associated with those responses on the appropriate tab of this workbook:

- 2.2 Contractor Best Practices:
- 2.3 Innovation and Value-Added Services;
- 2.6 Alternative Funding Models;
- 7.6 Optional Rollout Services; and
- 8.8 Optional Procurement Services

Further instructions are provided on each relevant tab.

- All proposed costs must be based on providing a Solution that would be fully funded by the State and independent of any offeror Alternative Funding Models.

If the offeror has entered cost details on tabs 7, 8, and 10 the offeror must enter the total cost at the top of the sheet in the highlighted space provided on the associated tab. This allows for the total cost to be displayed on the Workbook Summary View tab. The Workbook Summary View tab has preset formulas and is provided as a quick reference view of pertinent content of the workbook, however the individual tabs with cost details will be considered the official cost submission.

The offeror must note that month and years columns that have a “*” indicates a biennium year in which the Contract will automatically expire at the end of each biennium. The first of which is June 30, 2019. The State may renew this Contract for up to five (5) additional two-year term(s) as reflected. This is dependent upon the actual contract award date but assumes a date in March 2018 for the purpose of submitting costs for this RFP.

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Offeror Cost Proposal must be a separately sealed package, in native Excel format, not PDF.

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**Very Important**

- Not-to-Exceed Fixed-Price
- Three ‘Total Cost’ Columns
  - Implementation Period 1
  - Implementation Period 2
  - Contract Term
- MBE Costs and Percentages

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### Same Fixed-Price different breakdown

<table>
<thead>
<tr>
<th>Offeror must provide cost breakdown for both.</th>
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<tbody>
<tr>
<td>- Project Mgmt. Costs</td>
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<tr>
<td>- Initiate Phase Costs</td>
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<tr>
<td>- Analyze Phase Costs</td>
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<tr>
<td>- Design Phase Costs</td>
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<tr>
<td>- Build Phase Costs</td>
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<tr>
<td>- Test Phase Costs</td>
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<tr>
<td>- Deploy Phase Costs</td>
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<tr>
<td>- Run Phase Costs</td>
</tr>
<tr>
<td>- Other Project Tasks Costs</td>
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<tr>
<td>- Managed Services Costs</td>
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<tr>
<td>- Bill of Materials Costs</td>
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<tr>
<td>- Supplier Portal Costs</td>
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<td>- Supplier Enablement Costs</td>
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<td>- Buyer Portal Costs</td>
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<tr>
<td>- Identification of a Need Costs</td>
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<tr>
<td>- Request through Pay Costs</td>
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<tr>
<td>- Catalog Capabilities Costs</td>
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<tr>
<td>- Sourcing/Bid Mgmt. Costs</td>
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<tr>
<td>- Contract Mgmt. Costs</td>
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<tr>
<td>- Purchasing/Data Analytics Costs</td>
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<td>- Other Project Costs</td>
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<th>Item No.</th>
<th>Manufacturer</th>
<th>Description</th>
<th>Type of License</th>
<th>Unit Cost</th>
<th>No. of Units</th>
<th>Annual Costs</th>
<th>No. of Units</th>
<th>Annual Costs</th>
<th>No. of Units</th>
<th>Annual Costs</th>
<th>No. of Units</th>
<th>Annual Costs</th>
</tr>
</thead>
</table>
| Software Licensed/Maintenance
| Environmental Software License, Maintenance and Support | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - |
| Solution Software License, Maintenance and Support | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - |
| Offer Software License, Maintenance and Support | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - |
| Total Software Costs (Must agree with Project Cost Template) | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - |

**Indicates a biennium year where the contract automatically expires at the end of each biennium in which the first is June 30, 2019. The State may renew for up to five (5) additional two-year terms as reflected. This is dependent upon actual contract award date but assumes a date in March 2018.**
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**NextGen eProcurement**

RFP No. OA1190 - Attachment 09 - Offeror Cost Workbook

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<tr>
<th>Offeror:</th>
<th>State Enterprise Rollout Total Cost: $ -</th>
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<tbody>
<tr>
<td></td>
<td>Post State Enterprise Rollout Total Cost: $ -</td>
</tr>
</tbody>
</table>

**Optional Rollout Services**

The State may choose to contract with the Contractor for the Optional Rollout Services as detailed in Section 7.6.

On this tab, the offerer must provide associated costs for Optional Rollout Services for the following areas separately:
1. Optional State Enterprise Rollout as described in section 7.6.1, and;
2. Optional Post State Enterprise Rollout as described in section 7.6.2.
Offeror Cost Proposal must be a separately sealed package, in native Excel format, not PDF.

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**Optional Procurement Services**

The State may have a need for additional procurement expertise or consulting services. For example, the State may optionally require Strategic Sourcing Analyst Services that would provide robust analytic and decision-making information to enable the State to strategically assess spend across Supplier classifications, categories, organizational elements, buying trends, etc.

If the offeror has proposed Optional Procurement Services in section 8.8 of Supplement 1, the offeror must provide on this tab the costs associated with the aforementioned section.
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Closing Thoughts

The State welcomes all proposals to this RFP and wishes all offerors well in the development of their proposals.

Our response requirements are designed to be as straightforward as possible. In developing proposals Offerors are encouraged to seek:

**Completeness** – ensure that all requirements, forms and attachments are included as part of your response.

**Conciseness** – while showcasing the skills, experience, capabilities etc of your firm and team, please limit your responses to those required by the RFP. Try to avoid repetitious marketing statements.

**Clarity** – clear and *unambiguous representations* of skills, experience, capabilities etc of your firm preferred as are *commitments to meeting* the State’s requirements, project delivery and management requirements and driving positive outcomes.

Review the Evaluation Criteria for the Supplement(s) your firm is responding to.

State evaluators read every RFP response end-to-end.
• Welcome and Introductions
• Spotlight on Project & Solution Elements
• State RFP Responses: General Processes and Protocols

Open Inquiries: Questions & Answers
• Wrap-Up
Please enter your questions using the ‘Chat’ function in the Skype Session now.

Questions not answered may be resubmitted using the State Procurement Inquiry Process included in Part 3 of the RFP.
Welcome and Introductions

Spotlight on Project & Solution Elements

State RFP Responses: General Processes and Protocols

Open Inquiries: Questions & Answers

Wrap-Up
The State of Ohio thanks you for your participation in this procurement opportunity. The State looks forward to receiving and reviewing your responses!