

**AMENDMENT 2
FOR
RFP NUMBER 0A1147**

DATE AMENDMENT ISSUED: March 13, 2015

The State of Ohio, through the Department of Administrative Services, Office of Information Technology, is requesting proposals for:

Deliverables Based Information Technology Services (DBITS)

INQUIRY PERIOD BEGINS: February 18, 2015

INQUIRY PERIOD ENDS: March ~~16~~ 18, 2015

OPENING DATE: ~~March 20, 2015~~—March 30, 2015

OPENING TIME: 1:00 P.M.

**OPENING LOCATION: Department of Administrative Services
Enterprise IT Contracting
Bid Room 4200 Surface Road
Columbus, Ohio 43228**

The attached is Amendment for the RFP listed above. PLEASE NOTE THE OPENING DATE HAS BEEN EXTENDED TO MARCH 30, 2015.

Please insert the pages contained in the Amendment 5, 17, 18, 19, 21, 22, 30, 59, 62, 63, 65, 69, 71, and 75. The changes have strike through and are bolded.

Additionally, insert replacement page 51A contained in the Amendment between pages 51 and 52.

5. Technology Upgrade/Migration and Transformation

Definition: Technology Upgrade/Migration may be required to increase business functionality, reengineer a business function, keep current with vendor upgrades or when upgrading existing technology. Technology Transformation may be accomplished by converting/migrating legacy applications to new technology either with or without new business functionality or it may include introducing new technology into the enterprise.

Examples of included deliverables-based services: assessing the current application portfolio, evaluating technology assets before beginning technology transformation and Business Case development for justification of an initiative. Also included are: technology transformations, which may include, appropriate Return on Investment (ROI), benchmarks and milestones. The following activities may also be included: planning, analysis, proof of concept, deployment, implementation, integration, remediation, data migration, documentation, application programming and support services; and training support.

6. Business Intelligence and Data Warehouse

Definition: Business Intelligence (BI) enables an organization to perform in-depth analysis and includes, where required data mining of detailed business data providing real and significant information to business users. BI may include an integrated group of operational and decision support applications and databases. BI makes use of tools designed to easily access data within the data warehouse. A data warehouse collects, organizes and makes data available for the purpose of analysis and gives organizations the ability to access and analyze information about its business. The function of the data warehouse is to consolidate and reconcile information from across disparate business units and IT systems and provide a context for reporting and analysis.

Examples of included services: architectural design, extraction, transformation and loading of data sources; planning, assessment, product installation and tuning; prototype development, deployment, data cleansing, data mart development and support; reporting analytic development; customer support; business intelligence, data warehousing, and analytics SDLC services; data migration, integration with data mining; integration with business intelligence tools and/or systems; data scrubbing; data transformation; training and knowledge transfer.

Calendar of Events. The schedule for the RFP process and the Work is given below. The State may change this schedule at any time. If the State changes the schedule before the Proposal due date, it will do so through an announcement on the State Procurement Website's question and answer area for this RFP. The Website announcement will be followed by an amendment to this RFP, also available through the State's Procurement Website. After the Proposal due date and before the award of the Contract, the State will make schedule changes through the RFP amendment process.

A Work schedule for a particular Project Statement of Work will be established through the issuance of a Statement of Work Solicitation after the Contract award. Changes to a particular Work schedule will be addressed through the Statement of Work Solicitation process. It is each prospective offeror's responsibility to check the Website question and answer area for this RFP for current information regarding this RFP and its Calendar of Events through award of the Contract.

Dates:

Firm Dates

RFP Issued	February 18, 2015
Inquiry Period Begins	February 18, 2015
Inquiry Period Ends	March 18 March 18, 2015
Proposal Due Date	March 30 March 30, 2015 1:00 PM

Anticipated Dates

Award Date	May 4, 2015
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Criteria	Weight	Does Not Meet	Partially Meets	Meets
<ul style="list-style-type: none"> • Requirements definition • RFP development and publication • RFP scoring criteria development • RFP evaluation • Contract SOW development • Contract negotiations • Contract execution 				
1.4 Ohio-Based company or Ohio branch office	1	0	5-N/A	N/A 5
1.5 Encouraging Diversity Growth and Equity (EDGE) Business	1	0	5-N/A	N/A 5
2.0 Project Management				
2.1 The offeror must have experience in successfully delivering Project Management services throughout the lifecycle of a project on at least three (3) software application or systems development or software implementation or infrastructure projects within the last sixty (60) months, each of which has been implemented and used in a production setting, each of which the Project/Scope of Work spanned at least four (4) to six (6) months duration with a cost value of at least \$100,000.	3	0	3	5
2.2 At least one (1) of the Project/Scopes of Work required by 2.1 must have been for a federal, state, or local government jurisdiction or public institution of higher education.	2	0	N/A	5
2.3 The offeror must have completed at least two (2) projects within the last thirty-six (36) months that include the following services <ul style="list-style-type: none"> • Initiate a Project • Develop Project Charter • Develop Project Management Plan • Manage Customer Relations • Define Project Needs and Requirements • Establish a Project Structure • Form and Manage a Project Team • Develop a Work Breakdown Structure • Develop a Project Work Plan • Develop Project Support Plans • Manage Project Communications • Manage Project Documentation • Manage Change and Control Scope • Estimate Project Costs • Manage and Track Project Budget • Develop a Project Schedule • Manage Project Risk • Ensure Project Quality 	5	0	3	5

Criteria	Weight	Does Not Meet	Partially Meets	Meets
<ul style="list-style-type: none"> Track and Control Project Work Manage Customer Contracts Select and Manage Vendors Close a Project 				
2.4 Ohio-based company or Ohio branch office	1	0	5-N/A	N/A 5
2.5 Encouraging Diversity Growth and Equity (EDGE) Business	1	0	5-N/A	N/A 5
3.0 Application Development and Maintenance Transition Planning				
3.1 The offeror must have experience in successfully delivering Application Development and Maintenance Transition Planning services on at least three (3) software application development, implementation, or systems integration projects within the last sixty (60) months, each of which has been implemented and used in a production setting, each of which the Project/Scope of Work spanned at least four (4) to six (6) months duration with a cost value of at least \$100,000.	3	0	3	5
3.2 At least one (1) of the Project/Scopes of Work required by 3.1 must have been for a federal, state, or local government jurisdiction or public institution of higher education.	2	0	N/A	5
<p>3.3 At least two (2) of the Project/Scopes of Work required by 3.1 must have been completed by the offeror within the last thirty-six (36) months. The offeror must describe one or more of the following services (3.3.1-3.3.3), within each of the Project/Scope of Work descriptions.</p> <p>3.3.1 Delivering services that produce requirements, specification, design, and support documents that may include</p> <ul style="list-style-type: none"> Business, user, functional, non-functional, interface requirements System and software requirements specification System design documents Application architectures Data models Unit and UAT Planning and Execution Operations and maintenance manuals Transition plans Procedures manuals 	5	0	3	5

Criteria	Weight	Does Not Meet	Partially Meets	Meets
<p>3.3.2 Delivering services that support a range of system development lifecycle (SDLC) methodologies, including Waterfall, Agile, or Waterfall-Agile hybrid, that produce</p> <ul style="list-style-type: none"> • System and software applications • Application program interfaces and services integration • Web, mobile, and other platform application development <p>3.3.3 Delivering services that implement application and data integration technologies deployed on <i>n</i>-tier architectures, including</p> <ul style="list-style-type: none"> • Internet • Portals • Application servers • Integration servers • Data servers 				
3.4 Ohio-based company or Ohio branch office	1	0	5 N/A	N/A 5
3.5 Encouraging Diversity Growth and Equity (EDGE) Business	1	0	5 N/A	N/A 5
4.0 Independent Verification and Validation (IV&V)/Quality Assurance (QA)				
4.1 The offeror must have experience in successfully delivering IV&V/QA services across all phases of at least three (3) software application development, implementation, or systems integration projects within the last sixty (60) months, each of which has been implemented and used in a production setting, each of which the Project/Scope of Work spanned at least four (4) to six (6) months duration with a cost value of at least \$100,000.	3	0	3	5
4.2 At least one (1) of the Project/Scopes of Work required by 4.1 must have been for a federal, state, or local government jurisdiction or public institution of higher education.	2	0	N/A	5
4.3 At least two (2) of the Project/Scopes of Work required by 4.1 must have been completed by the offeror within the last thirty-six (36) months. The offeror must describe the IV&V/QA services that provided monitoring and assessing customer and third party provider project management, contract management, technical development, and quality assurance methodologies and programs. Services	5	0	3	5

Criteria	Weight	Does Not Meet	Partially Meets	Meets
<ul style="list-style-type: none"> • Execution of Software Integration Tests • Defect Analysis • Reporting <p>4.3.8 Software System Test</p> <ul style="list-style-type: none"> • Completion of Software System Test Preparation • Execution of Software System Tests • Defect Analysis • Reporting <p>4.3.9 Software Installation Test</p> <ul style="list-style-type: none"> • Installation Configuration Audit • Defect Analysis • Reporting <p>4.3.10 Customer Tests</p> <ul style="list-style-type: none"> • Test Witnessing • Defect Analysis • Reporting <p>4.3.11 Structural Tests</p> <ul style="list-style-type: none"> • Document Inspection • Training Evaluation • Security (FISMA, IA, C&A) • Disaster Recovery • Usability and Section 508 Accessibility • Compliance (SOX, HIPAA, etc.) • Load and Performance 				
4.4 Ohio-based company or Ohio branch office	1	0	5 N/A	N/A 5
4.5 Encouraging Diversity Growth and Equity (EDGE) Business	1	0	5 N/A	N/A 5
5.0 Technology Upgrade/ Migration and Transformation				
5.1 The offeror must have experience in successfully delivering Technology services for at least three (3) technology service delivery organizations within the last sixty 60 months, each of which has been implemented and used in a production setting, each of which the Project/Scope of Work spanned at least four (4) to six (6) months duration with a cost value of at least \$100,000.	3	0	3	5
5.2 At least one (1) of the Project/Scopes of Work required by 5.1 must have been for a federal, state, or local government jurisdiction or public institution of higher education.	2	0	N/A	5
5.3 At least two (2) of the Project/Scopes of Work required by 5.1 must have been completed by the offer (s) within the last thirty-six (36) months. The	5	0	3	5

Criteria	Weight	Does Not Meet	Partially Meets	Meets
offeror must describe the services provided in modernizing/migrating legacy applications to a new technology platform, which may be mainframe, server, network-based, web-based, mobile, or a combination of these platforms and other upgrades, migrations and transformation services delivered in the Project/Scopes of Work.				
5.4 Ohio-based company or Ohio branch office	1	0	5 N/A	N/A 5
5.5 Encouraging Diversity Growth and Equity (EDGE) Business	1	0	5 N/A	N/A 5
6.0 Business Intelligence and Data Warehouse				
6.1 The offeror must have at least 3 projects/SOW's, within the last forty-eight (48) months, successfully delivered Business Intelligence solutions, including: data warehouse design/implementation, data modeling, report or analytics development, and customer support for: A federal, state, or local government agency, public institution of higher education, or private entity with at least \$5 billion in annual revenue <u>or</u> 5,000 employees <u>OR</u> A Fortune 500 company.	5	0	3	5
6.2 The offeror must have, within the last forty-eight (48) months, successfully completed an engagement meeting the requirements of Section 6.1 for which the Project/Scope of Work was at least 3,000 hours of effort.	2	0	3	5
6.3 The offeror must have, within the last forty-eight (48) months, successfully completed an engagement meeting the requirements of Section 6.1 for which the Project/Scope of Work was delivered at a fixed price.	3	0	3	5
6.4 At least one (1) of the Projects/Scopes of Work required by Section 6.1 must have been completed within the last thirty-six (36) months	3	0	3	5
6.5 Ohio-based company or Ohio branch office	1	0	5 N/A	N/A 5
6.6 Encouraging Diversity Growth and Equity (EDGE) Business	1	0	5 N/A	N/A 5

Evaluation Scoring Formula. The evaluation team will rate the Proposals that meet the Mandatory Requirements based on the following criteria and respective weights.

reference(s) to the section(s) of the RFP that the assumption is applicable to. Offerors should not include assumptions elsewhere in their response.

Proof of Insurance. The offeror must provide the certificate of insurance required by Attachment Four. The policy may be written on an occurrence or claims made basis.

Payment Address. The offeror must give the address to which the State should send payments under the Contract.

Legal Notice Address. The offeror must give the name, title, and address to which the State should send legal notices under the Contract.

W-9 Form. The offeror must complete a W-9 form in its entirety. The offeror must submit at least one originally signed W-9. All other copies of a Proposal may contain copies of the W-9. The offeror must indicate on the outside of the binder which Proposal contains the originally signed W-9. A current version of the Internal Revenue's W-9 form is available <http://www.irs.gov/pub/irs-pdf/fw9.pdf>

Independent Contractor Acknowledgement Form. Unless the offeror is a "business entity" as that term is defined in ORC. 145.037 ("an entity with five or more employees that is a corporation, association, firm, limited liability company, partnership, sole proprietorship, or other entity engaged in business"), the offeror must complete and submit an originally signed Independent Contractor Acknowledgement form in its entirety. All other copies of a Proposal may contain copies of the Independent Contractor Acknowledgement form. The offeror must indicate on the outside of the binder which Proposal contains the originally signed Independent Contractor Acknowledgement form. A current version of the Independent Contractor Acknowledgement form is available at <https://www.opers.org/forms-archive/PEDACKN.pdf>.

Standard Affirmation and Disclosure Form (EO 2011-12K). The offeror must complete ~~and sign the~~ Affirmation and Disclosure Form (Attachment ~~Eleven~~ **Eight**) as part of its Proposal. Executive Order 2011-12K is available at <http://www.governor.ohio.gov/Portals/0/pdf/executiveOrders/EO%202011-12K.pdf>

Acceptance of Attachment Four – General Terms and Conditions. Offerors must include the entire content of Attachment Four as a single section in their proposal. The offerors must include a statement at the beginning of the section indicating that the offeror has read, understands and agrees to the General Terms and conditions contained in Attachment Four.

OFFEROR MANDATORY REQUIREMENTS – TECHNOLOGY CATEGORY SPECIFIC

Note: The offeror may duplicate this form as necessary to demonstrate the requirement.

The offeror, or its proposed subcontractor must demonstrate meeting the applicable mandatory requirements corresponding with each Technology Category that it has proposed to be considered for award.

MANDATORY REQUIREMENT: The offeror must have a minimum of thirty-six (36) months of experience as a prime contractor providing Information Technology Assessment, Planning, and Solicitation Assistance services.

Offeror or its proposed subcontractor(s) Name:		
Customer Company Name:	Customer Contact Name: (Indicate Primary or Alternate)	
	Customer Contact Title:	
Customer Company Address:	Customer Contact Phone Number:	
	Customer Contact Email Address:	
Project Name:	Beginning Date of Experience (month/year):	Ending Date of Experience (month/year):
<p>Describe how the Related Service shows the offeror's, experience, capability, and capacity to provide Project Management Information Technology Assessment, Planning and Solicitation Assistance services. Offeror's are advised to customize their proposal response and to provide specific detailed information demonstrating experience similar in nature to the type of work described in the Technical Category Definitions included in this RFP.</p>		

Technology Category: Information Technology Assessment, Planning, and Solicitation Assistance	
Total Offeror Staff Assigned:	
Total subcontractor FTEs Assigned:	
Description of the Project/Scope of Work	
Describe in detail the Project/Scope of Work performed by the offeror which identified opportunities to achieve cost saving, strengthen processes, improve organizational alignment with the business.	
Describe in detail the specific services (1.2.1-1.2.3 1.3.1-1.3.3) that were delivered in the Project/Scope of Work.	
Describe the offeror's knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror has integrated knowledge transfer and other education and training techniques into an effective learning experience for the customer.	
Describe the project management, process engineering, quality assurance, risk response, software and system development, service management, and/or compliance standards, frameworks, and methodologies that were utilized in this Project/Scope of Work and describe how the offeror's organization contributed to the establishment or advancement of the customer's core competencies in the implementation and use of these frameworks.	
Describe the qualifications and certifications of the offeror's staff assigned to this Project/Scope of Work related to project management, process engineering, software and system development, service management, and/or compliance frameworks and methodologies.	
Describe the Project/Scope of Work outcomes for which the offeror's organization was responsible that exceeded customer expectations.	
Provide a sample of the offeror's organization deliverables for this Project/Scope of Work. The sample does not have to identify the client. However, the sample must be representative of the level of detail and content that will be contained in deliverables.	
Indicate the total number of hours of work effort for the Project/Scope of Work.	

***** COPY AND SUBMIT A MINIMUM OF THREE (3) FORMS
FOR EACH OF TECHNOLOGY CATEGORY*****

Project Management
Describe the offeror's knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror has integrated knowledge transfer and other education and training techniques into an effective learning experience for the customer.
Describe the project management, process engineering, quality assurance, risk response, software and system development, service management, and/or compliance standards, frameworks, and methodologies that were utilized in this Project/Scope of Work and describe how the offeror's organization contributed to the establishment or advancement of the customer's core competencies in the implementation and use of these frameworks.
Describe the qualifications and certifications of the offeror's staff assigned to this Project/Scope of Work related to project management, process engineering, software and system development, service management, and/or compliance frameworks and methodologies.
Describe the Project/Scope of Work outcomes for which the offeror's organization was responsible that exceeded customer expectations.
Provide a sample of the offeror's organization deliverables for this Project/Scope of Work. The sample does not have to identify the client. However, the sample must be representative of the level of detail and content that will be contained in deliverables.
Indicate the total number of hours of work effort for the Project/Scope of Work.

***** COPY AND SUBMIT A MINIMUM OF THREE (3) FORMS
FOR EACH OF TECHNOLOGY CATEGORY*****

5.0 3.0 Application Development and Maintenance Transition Planning (section # changes from 5.0 to 3.0)

- 3.1 The offeror must have experience in successfully delivering Application Development and Maintenance Transition Planning services on at least three (3) software application development, implementation, or systems integration projects within the last sixty (60) months, each of which has been implemented and used in a production setting, each of which the Project/Scope of Work spanned at least four (4) to six (6) months duration with a cost value of at least \$100,000.
- 3.2 At least one (1) of the Project/Scopes of Work required by 3.1 must have been for a federal, state, or local government jurisdiction or public institution of higher education.
- 3.3 At least two (2) of the Project/Scopes of Work required by 3.1 must have been completed by the offeror within the last thirty-six (36) months. The offeror must describe one or more of the following services (3.3.1-3.3.3), within each of the Project/Scope of Work descriptions.
 - 3.3.1 Delivering services that produce requirements, specification, design, and support documents that may include
 - Business, user, functional, non-functional, interface requirements
 - System and software requirements specification
 - System design documents
 - Application architectures
 - Data models
 - Unit and UAT Planning and Execution
 - Operations and maintenance manuals
 - Transition plans
 - Procedures manuals
 - 3.3.2 Delivering services that support a range of system development lifecycle (SDLC) methodologies, including Waterfall, Agile, or Waterfall-Agile hybrid, that produce
 - System and software applications
 - Application program interfaces and services integration
 - Web, mobile, and other platform application development
 - 3.3.3 Delivering services that implement application and data integration technologies deployed on *n*-tier architectures, including
 - Internet
 - Portals
 - Application servers
 - Integration servers
 - Data servers
- 3.4 Ohio-based company or Ohio branch office
- 3.5 Encouraging Diversity Growth and Equity (EDGE) Business

Application Development and Maintenance Transition Planning	
Offeror Information	
Offeror Name:	Offeror Contact/Name:

Application Development and Maintenance Transition Planning
Describe in detail the specific services (3.2.1-3.2.3) that were delivered in the Project/Scope of Work.
Describe the offeror's knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror has integrated knowledge transfer and other education and training techniques into an effective learning experience for the customer.
Describe the project management, process engineering, quality assurance, risk response, software and system development, service management, and/or compliance standards, frameworks, and methodologies that were utilized in this Project/Scope of Work and describe how the offeror's organization contributed to the establishment or advancement of the customer's core competencies in the implementation and use of these frameworks.
Describe the qualifications and certifications of the offeror's staff assigned to this Project/Scope of Work related to project management, process engineering, software and system development, service management, and/or compliance frameworks and methodologies.
Describe the Project/Scope of Work outcomes for which the offeror's organization was responsible that exceeded customer expectations.
Provide a sample of the offeror's organization deliverables for this Project/Scope of Work. The sample does not have to identify the client. However, the sample must be representative of the level of detail and content that will be contained in deliverables.
Indicate the total number of hours of work effort for the Project/Scope of Work.

***** COPY AND SUBMIT A MINIMUM OF THREE (3) FORMS
FOR EACH OF TECHNOLOGY CATEGORY*****

Independent Verification and Validation (IV&V)/Quality Assurance
Describe the project management, process engineering, quality assurance, risk response, software and system development, service management, and/or compliance standards, frameworks, and methodologies that were utilized in this Project/Scope of Work and describe how the offeror's organization contributed to the establishment or advancement of the customer's core competencies in the implementation and use of these frameworks.
Describe the qualifications and certifications of the offeror's staff assigned to this Project/Scope of Work related to project management, process engineering, software and system development, service management, and/or compliance frameworks and methodologies.
Describe the Project/Scope of Work outcomes for which the offeror's organization was responsible that exceeded customer expectations.
Provide a sample of the offeror's organization deliverables for this Project/Scope of Work. The sample does not have to identify the client. However, the sample must be representative of the level of detail and content that will be contained in deliverables.
Indicate the total number of hours of work effort for the Project/Scope of Work.

***** COPY AND SUBMIT A MINIMUM OF THREE (3) FORMS
FOR EACH OF TECHNOLOGY CATEGORY*****

Technology Upgrade/Migration and Transformation		
Schedule:		
Explain variances over/under 10%:		
Total number of years and months (example, 4 years, 6 months) for which The offeror has performed this service:		
	Planned/Actual Cost	
	Planned (Budgeted)	Actual (Expended)
Total Project Cost:	\$	\$
Offeror's Contract Value:	\$	\$
Explain variances over/under 10%:		
Total Offeror Staff assigned:		
Total subcontractor FTEs assigned:		
Description of the Project/Scope of Work		
Describe in detail the Project/Scope of Work performed by the offeror and the services provided in modernizing/migrating legacy applications to a new technology platform, which may be mainframe, server, network-based, web-based, mobile, or a combination of these platforms and other upgrades, migrations and transformation services delivered in the Project/Scopes of Work.		
Describe the offeror's knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror has integrated knowledge transfer and other education and training techniques into an effective learning experience for the customer.		
Describe the project management, process engineering, quality assurance, risk response, software and system development, service management, and/or compliance standards, frameworks, and methodologies that were utilized in this Project/Scope of Work and describe how the offeror's organization contributed to the establishment or advancement of the customer's core competencies in the implementation and use of these frameworks.		
Describe the qualifications and certifications of the offeror's staff assigned to this Project/Scope of Work related to project management, process engineering, software and system development, service management, and/or compliance frameworks and methodologies.		
Describe the Project/Scope of Work outcomes for which the offeror's organization was responsible that exceeded customer expectations.		
Provide a sample of the offeror's organization deliverables for this Project/Scope of Work. The sample does not have to identify the client. However, the sample must be representative of the level of detail and content that will be contained in deliverables.		

Business Intelligence and Data Warehouse
Provide a sample of the offeror's organization deliverables for this Project/Scope of Work. The sample does not have to identify the client. However, the sample must be representative of the level of detail and content that will be contained in deliverables.
Indicate the total number of hours of work effort for the Project/Scope of Work.

***** COPY AND SUBMIT A MINIMUM OF THREE (3) FORMS
FOR EACH OF TECHNOLOGY CATEGORY*****