

**AMENDMENT 2  
FOR  
MINORITY BUSINESS ENTERPRISE (MBE) SET-ASIDE  
RFP NUMBER 0A1139**

**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 6, 30, 58, 61, 64, 67, 68, 71, 73 and 74. The changes have strike through and are bolded.

Additionally, insert replacement page 50A contained in the Amendment between pages 50 and 51.

Inquiry Period Ends **March 16, 18, 2015**  
Proposal Due Date **March 20 30, 2015 1:00 PM**

Anticipated Dates

Award Date **May 4, 2015**

There are references in this RFP to the Proposal due date. Unless it is clearly provided to the contrary in this RFP, any such reference means the date and time (Columbus, Ohio local time) that the Proposals are due and not just the date.

**PART TWO: STRUCTURE OF THIS RFP**

**Organization.** This RFP is organized into five (5) parts and has eight (8) attachments. The parts and attachments are listed below. There also may be one or more supplements to this RFP listed below.

**Parts**

Part One	Executive Summary
Part Two	Structure of this RFP
Part Three	General Instructions
Part Four	Evaluation of Proposals
Part Five	Award of the Contract

**Attachments**

Attachment One	Evaluation Criteria
Attachment Two	Work Requirements and Special Provisions
Attachment Three	Requirements for Proposals
Attachment Four	General Terms and Conditions
Attachment Five	Sample Contract
Attachment Six	Offeror Certification Form
Attachment Seven	Offeror Profile Summary
Attachment Eight	Standard Affirmation and Disclosure Form – EO 2011-12K

**PART THREE: GENERAL INSTRUCTIONS**

The following sections provide details on how to get more information about this RFP and how to respond to it. All responses must be complete and in the prescribed format.

**Contacts.** The following person will represent the State during the RFP process:

Procurement Representative:

Jackie Flemmings, Acquisition Analyst  
DAS/Office of Information Technology (OIT)  
Enterprise IT Contracting  
30 East Broad Street, 39<sup>th</sup> Floor  
Columbus, OH 43215

During the performance of the Work, a State representative (the "OIT Analyst") will represent the administration of the State's contracts with DBITS contractors. Work authorized through approved SOWs

**Assumptions.** The offeror must list all the assumptions the offeror made in preparing the Proposal. If any assumption is unacceptable to the State, the State may at its sole discretion request that the offeror remove the assumption or choose to reject the Proposal. No assumptions may be included regarding the outcomes of negotiation, terms and conditions, or requirements. Assumptions should be provided as part of the offeror response as a stand-alone response section that is inclusive of all assumptions with 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 an ~~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 or its proposed subcontractor(s) must have a minimum of thirty-six (36) months of experience as a prime contractor providing Information Technology Assessment, Planning, and Solicitation Assistance services.

<b>Offeror or its proposed subcontractor(s) Name:</b>		
<b>Customer Company Name:</b>	<b>Customer Contact Name:</b> (Indicate Primary or Alternate)	
	<b>Customer Contact Title:</b>	
<b>Customer Company Address:</b>	<b>Customer Contact Phone Number:</b>	
	<b>Customer Contact Email Address:</b>	
<b>Project Name:</b>	<b>Beginning Date of Experience (month/year):</b>	<b>Ending Date of Experience (month/year):</b>
<p>Describe how the Related Service shows the offeror's, or proposed subcontractor's, experience, capability, and capacity to provide <b>Project Management Information Technology Assessment, Planning, and Solicitation Assistance</b> 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>		

<b>Technology Category: Information Technology Assessment, Planning, and Solicitation Assistance</b>	
Total subcontractor FTEs Assigned:	
<b>Description of the Project/Scope of Work</b>	
Describe in detail the Project/Scope of Work performed by the offeror or its proposed subcontractor(s) which identified opportunities to achieve cost saving, strengthen processes, improve organizational alignment with the business.	
Describe in detail the specific services ( <del>1.2.1-1.2.3</del> 1.3.1-1.3.3) that were delivered in the Project/Scope of Work.	
Describe the offeror's or its proposed subcontractor(s) knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror or its proposed subcontractor(s) 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 or its proposed subcontractor(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 or its proposed subcontractor(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 or its proposed subcontractor(s) organization was responsible that exceeded customer expectations.	
<b>Provide a sample of the offeror's or its proposed subcontractor(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.</b>	
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\*\*\***

<b>Project Management</b>
Describe the offeror's or its proposed subcontractor(s) knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror or its proposed subcontractor(s) 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 or its proposed subcontractor(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 or its proposed subcontractor(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 or its proposed subcontractor(s) organization was responsible that exceeded customer expectations.
<del>Provide a sample of the offeror's or its proposed subcontractor(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.</del>
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\*\*\***

<b>Application Development and Maintenance Transition Planning</b>
Describe in detail the specific services ( <del>3.2.1-3.2.3</del> 3.3.1-3.3.3) that were delivered in the Project/Scope of Work.
Describe the offeror's or its proposed subcontractor(s) knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror or its proposed subcontractor(s) 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 or its proposed subcontractor(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 or its proposed subcontractor(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 or its proposed subcontractor(s) organization was responsible that exceeded customer expectations.
<b>Provide a sample of the offeror's or its proposed subcontractor(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.</b>
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\*\*\***

<b>Independent Verification and Validation (IV&amp;V)/Quality Assurance</b>		
Customer Organization:	Customer Contact Name Primary: Alternate:	
Customer Address:	Customer Phone Primary: Alternate:	Customer Fax:
<input type="checkbox"/> Federal Gov't <input type="checkbox"/> State Gov't <input type="checkbox"/> Local Gov't <input type="checkbox"/> Public Higher Education	Customer Email Primary: Alternate:	
<b>Project/Scope of Work Information</b>		
Name:		
Contract Type:		
<b>Schedule and Cost Information</b>		
	<b>Schedule Begin/End Dates</b>	
	<b>Begin Date</b> [Month/Year]	<b>End Date</b> [Month/Year]
Schedule:		
Explain variances over/under 10%:		
Total number of years and months (example, 4 years, 6 months) for which the offeror or its proposed subcontractor(s) has performed this service:		
	<b>Planned/Actual Cost</b>	
	<b>Planned (Budgeted)</b>	<b>Actual (Expended)</b>
Total Project Cost:	\$	\$
Offeror's or its proposed subcontractor(s) Contract Value:	\$	\$
Explain variances over/under 10%:		
Total Offeror or its proposed subcontractor(s) Staff assigned:		
Total Subcontractor FTEs assigned:		
<b>Description of the Project/Scope of Work</b>		
Describe in detail the Project/Scope of Work performed by the offeror or its proposed subcontractor(s) and 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.		

<b>Independent Verification and Validation (IV&amp;V)/Quality Assurance</b>
Describe the offeror's or its proposed subcontractor(s) knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror or its proposed subcontractor(s) 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 or its proposed subcontractor(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 or its proposed subcontractor(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 or its proposed subcontractor(s) organization was responsible that exceeded customer expectations.
<b>Provide a sample of the offeror's or its proposed subcontractor(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.</b>
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\*\*\***

<b>Technology Upgrade/Migration and Transformation</b>
Describe the qualifications and certifications of the offeror's or its proposed subcontractor(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 or its proposed subcontractor(s) organization was responsible that exceeded customer expectations.
<b>Provide a sample of the offeror's or its proposed subcontractor(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.</b>
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 TECHNOLOGY CATEGORY\*\*\***

<b>Business Intelligence and Data Warehouse</b>		
	<b>Begin Date [Month/Year]</b>	<b>End Date [Month/Year]</b>
Schedule:		
Explain variances over/under 10%:		
Total number of years and months (example, 4 years, 6 months) for which The offeror or its proposed subcontractor(s) has performed this service:		
	<b>Planned/Actual Cost</b>	
	<b>Planned (Budgeted)</b>	<b>Actual (Expended)</b>
Total Project Cost:	\$	\$
Offeror's or its proposed subcontractor(s) Contract Value:	\$	\$
Explain variances over/under 10%:		
Total Offeror or its proposed subcontractor(s) Staff assigned:		
Total subcontractor FTEs assigned:		
<b>Description of the Project/Scope of Work</b>		
<p>Describe in detail the Project/Scope of Work performed by the offeror or its proposed subcontractor(s) and the services provided in <del>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</del> <b>Business Intelligence solutions, including: data warehouse design/implementation, data modeling, report or analytics development, and customer support in the Project/Scopes of Work.</b></p>		
<p>Describe the offeror's or its proposed subcontractor(s) knowledge transfer and training strategies on this Project/Scope of Work. Response should demonstrate how the offeror or its proposed subcontractor(s) has integrated knowledge transfer and other education and training techniques into an effective learning experience for the customer.</p>		
<p>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 or its proposed subcontractor(s) organization contributed to the establishment or advancement of the customer's core competencies in the implementation and use of these frameworks.</p>		
<p>Describe the qualifications and certifications of the offeror's or its proposed subcontractor(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.</p>		

<b>Business Intelligence and Data Warehouse</b>
Describe the Project/Scope of Work outcomes for which the offeror's or its proposed subcontractor(s) organization was responsible that exceeded customer expectations.
<del>Provide a sample of the offeror's or its proposed subcontractor(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.</del>
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\*\*\***