

INDIANA DEPARTMENT OF ADMINISTRATION  
On Behalf Of  
INDIANA DEPARTMENT OF CHILD SERVICES  
CHILD SUPPORT BUREAU

Request for Services 20-017  
PMO Services for the  
INvest Child Support Automated System

Pre-Proposal Conference  
July 26, 2019 at 1:00 PM



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[Jhelmer@idoa.IN.gov](mailto:Jhelmer@idoa.IN.gov)

# Agenda

- General Information
- Purpose of RFS
- PMO Services Overview
- Term of the Contract
- Key Dates
- Business Proposal, Technical Proposal, Cost Proposal
- Proposal Preparation & Evaluation
- Minority and Women's Business Enterprises (M/WBE)
- Additional Information
- Question and Answer Session



# General Information

- Sign-In Sheet for Attendees
- Sign-In Sheet and PowerPoint will be posted on IDOA's Solicitation Website
- Hold questions until the end of the presentation
  - Attendees via the Webex or phone will need to submit all questions via the Question/Inquiry process outlined in Section 1.7 of the RFS.
  - Any verbal response is not considered binding; respondents are encouraged to submit any question formally in writing if it affects the proposal that will be submitted to the state.



# General Information (cont.)

- No questions will be taken today regarding the scope of work for this project. Today's session is meant to cover process-related topics (i.e. how to fill out IDOA forms)
- Any questions asked today along with any scope of work related questions should be submitted in writing per section 1.7 of the RFS to receive a formal response.



# Purpose of the RFS

The overall purpose of this RFS is to select and contract with a qualified vendor that can satisfy CSB's need for PMO services for the INvest Project.



# PMO Services Overview

It is the intent of CSB to contract with a vendor that can prove their abilities and experience in the following key areas:

- Title IV-D Child Support Program
- Adhering to diligent project management practices, present tactics and strategies to manage the triple constraints of time, cost, and quality
- Developing and maintaining an overall master Project Management Plan (PMP) that combines the PMO, DDI, IV&V, and QA vendors' PMPs
- Developing and maintaining an overall master project schedule
- Verifying and validating the DDI vendor's status reporting, including progress updates on time, cost, and quality measures, and proactively identify course corrections when needed
- Taking responsibility and ownership of the requirements management process and implementation of the entire INvest product backlog
- Working closely with the Quality Assurance vendor to establish INvest quality, performance standards, and measures for the DDI vendor, and ensure the DDI vendor meets Indiana and the federal Office of Child Support Enforcement (OCSE) certification requirements throughout INvest
- Developing the INvest Annual Advanced Planning Document Updates (AAPDU)
- Supporting a state-led change management effort
- Collaborating to work as one team throughout the life of a project



# Term of the Contract

## Contract Term

- Section 1.14 of the RFS document.
- The term of the contract shall be for a period of three (3) years from the date of contract execution. There may be two (2) one-year renewals for a total of five (5) years at the State's option.



# Key Dates

Activity	Date
Issue of RFS	July 19, 2019
Pre-Proposal Conference	July 26, 2019 at 1:00 PM ET Conference Room 19 Indiana Government Center South Webex: <a href="#">Join the meeting</a>
Deadline to Submit Written Questions	August 1, 2019 by 3:00 PM Eastern Time
Response to Written Questions/RFS Amendments	August 8, 2019
Letter of Intent to Respond	August 16, 2019 by 3:00 PM Eastern Time
Submission of Proposals	August 30, 2019 by 3:00 PM Eastern Time
<i>The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.</i>	
Proposal Evaluation	September through October 2019
Proposal Discussions/Clarifications (if necessary)	TBD
Oral Presentations (if necessary)	October through November 2019
Best and Final Offers (if necessary)	November 2019
RFS Award Recommendation	November 2019





# Business Proposal (Attachment E)

## ■ Company Financial Information (Section 2.3.3)

- Confidential information must be kept separate from the proposal in the electronic copies. IDOA recommends sending a “public” file that has the confidential information redacted (may be in PDF format) and a “final” file that includes all required information (must be in format provided).

## ■ Contract Terms (Section 2.3.5)

- Respondent should review the sample State contract (Attachment C) and note exceptions to State non-mandatory clauses in Business Proposal. The Respondent should accept the mandatory clauses in the Business Proposal and Transmittal Letter.



# Business Proposal (Attachment E)

## ■ References (2.3.6)

- The Respondent must include a list of at least three (3) clients for whom they have provided products and/or services that are the same or similar to those requested in this RFS.
- Reference information is now captured on Attachment L.
- Other than the reference contact information on Attachment L, this attachment should be completed by the reference and mailed or emailed DIRECTLY to the address provided on Attachment L.
- References are due ten (10) business days (excluding State recognized holidays) after the date of the Submission of Proposals.
- All should be postmarked or emailed no later than the tenth (10th) business day after the Submission of Proposals due date, as outlined in Section 1.24.



# Technical Proposal Response Template (Attachment F-1)

- Please answer all questions we have provided for you in the Technical Proposal Response Template.
- Your response should follow the structure outlined in the instructions.
- If a question requests an example and the file is too large to insert within the response area, please attach the file and clearly indicate the requirement it belongs to and the file name of the example.
- Respondents are discouraged from simply repeating language from the RFS as evidence of an understanding or capability.



# Cost Proposal (Attachment D)

## Cost Proposal Composition

- Title Page
- Summary
- Pricing by Task
- Hourly Rates



# Cost Proposal (Attachment D)

## Summary Page

	A	B	C	D	E	F	G	H	I	J	K
1	State of Indiana, RFS 20-017										
2	Attachment D - Cost Proposal					Respondent Name: <input type="text"/>					
3	Summary										
4											
5	<b>INSTRUCTIONS:</b> The following will be used to assign cost points. Please fill in only the cells shaded yellow. Note that the blue cells will populate automatically with not-to-exceed (NTE) pricing, calculated from your bid information entered on the tabs that follow. Other than entering your firm's name at the top of the page, there is no response necessary on this worksheet.										
6											
7											
8											
9	Cost Proposal Summary				Total NTE Cost						
10	Pricing by Task Years 1-3				\$ -						
11	Total Bid Amount (NTE):				\$ -						

# Cost Proposal (cont.)

## Cost Proposal Narrative & Cost Assumptions, Conditions and Constraints

- Outlined in Section 2.5 of the RFS
- Compose and return these documents in a Microsoft Word or Searchable PDF format, labeled as “Cost Proposal Narrative” and “Cost Assumptions, Conditions and Constraints”.

# Proposal Preparation

- When submitting your response, please create a separate electronic folder for each component to which you are responding (Transmittal Letter, Business Proposal, Technical Proposal, Cost Proposal, etc.).
  - These folders should contain all of their pertinent files for only that component, i.e., Transmittal Letter, Business Proposal template, MWBE forms, etc.
- Transmittal Letter - Confidential Information (RFS Section 2.2.5)
  - Use this section to help outline any proposed confidential information.
  - Complete Proposal and Redacted Proposal



# Proposal Preparation (cont.)

- Attachment D (Cost Proposal) must be returned in Excel
- Use the templates provided for all answers
- Do not alter templates
- Submit all questions using template provided via email using the Q&A Template (Attachment B) to [JHelmer@idoa.IN.gov](mailto:JHelmer@idoa.IN.gov)








# Proposal Evaluation

## *Summary of Evaluation Criteria:*

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	50 available points
3. Cost (Cost Proposal)	25 available points
4. Minority Business Enterprise Subcontractor Commitment	5 ( 1 bonus point is available, see Section 3.2.6)
5. Women Business Enterprise Subcontractor Commitment	5 ( 1 bonus point is available, see Section 3.2.6)
Total	85 (87 if bonus awarded)

### Legend

-  Mandatory Requirements
-  MAQ and Cost Scores
-  Preference Scores

- Geographical preference has been excluded from the proposal evaluations, more specifically:
  - Buy Indiana, Indiana Economic Impact and Indiana Veteran Owned Small Business



# Minority and Women's Business Enterprises

## Mission/Vision

- Promote, monitor, and enforce the standards for certification of minority and women's business enterprises.
- Provide equal opportunity to minority and women enterprises in the state's procurement and contracting process.

## Nondiscrimination and Antidiscrimination Laws

- Pursuant to Indiana Civil Rights Law, specifically IC §22-9-1-10, every state contract shall contain a provision requiring the contractor and subcontractors to not discriminate against any employee or applicant with respect to Protected Characteristics



# Minority and Women's Business Enterprises

## Contact Information

- Phone: 317-232-3061
- E-mail: [mwbecompliance@idoa.in.gov](mailto:mwbecompliance@idoa.in.gov)
- Web: [www.in.gov/idoa/mwbe](http://www.in.gov/idoa/mwbe)

## Complete Attachment A, MWBE Form

- Include sub-contractor letter of commitment

## Goals for Proposal

- 8% Minority Business Enterprise
- 8% Women's Business Enterprise



**ATTACHMENT A  
MINORITY & WOMEN'S BUSINESS ENTERPRISES RFS SUBCONTRACTOR  
COMMITMENT FORM**

In accordance with 25 IAC 5-5, the respondent is expected to submit with its proposal a Minority & Women's Business Enterprises RFS Subcontractor Commitment Form. The Form must show that there are, participating in the proposed contract, Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) listed in the Minority and Women's Business Enterprises Division (MWBED) directory of certified firms located at <http://www.in.gov/idoa/2352.htm>.

If participation is met through use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of products and/or services provided that are directly related to this proposal and the cost of direct supplies for this proposal. Respondents must complete the Subcontractor Commitment Form in its entirety. The amount entered in "TOTAL BID AMOUNT" should match the amount entered in the Attachment D, Cost Proposal Template.

Failure to meet these goals will affect the evaluation of your Proposal. The Department reserves the right to verify all information included on the MWBE Subcontractor Commitment Form.

**Prime Contractors must ensure that the proposed subcontractors meet the following criteria:**

- Must be listed on the IDOA Directory of Certified Firms, on or before the proposal due date
- Prime Contractor must include with their proposal the subcontractor's M/WBE Certification Letter provided by IDOA, to show current status of certification.
- Each firm may only serve as one classification – MBE, WBE, or IVOSB (see section 1.22)
- A Prime Contractor who is an MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- **Must serve a Valuable Scope Contribution (VSC). The firm must serve a value-added purpose on the engagement, as confirmed by the State.**
- Must provide goods or service only in the industry area for which it is certified as listed in the directory at <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract
- National Diversity Plans are generally not acceptable

**MINORITY & WOMEN'S BUSINESS ENTERPRISES RFS SUBCONTRACTOR LETTER OF  
COMMITMENT (MWBE)**

A signed letter(s), on company letterhead, from the MBE and/or WBE must accompany the MWBE Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the MBE and/or WBE of its subcontract amount, a description of products and/or services to be provided on this project, and approximate date the subcontractor will perform work on this contract. The MBE and/or WBE subcontractor amount and subcontractor percentage is only based on the initial term of the contract, unless the products and/or services are needed beyond the initial term. Any products and/or services desired after the initial term will require separate negotiations between the prime contractor and subcontractor. The State may deny evaluation points if the letter(s) is not attached, not on company letterhead, not signed and/or does not reference and match the subcontract amount, subcontract amount as a percentage of the "TOTAL BID AMOUNT" and the anticipated period that the Subcontractor will perform work for this solicitation.

By submission of the Proposal, the Respondent acknowledges and agrees to be bound by the regulatory processes involving the State's M/WBE Program. Questions involving the regulations governing the MWBE Subcontractor Commitment Form should be directed to: Minority and Women's Business Enterprises Division at (317) 232-3061 or <http://www.in.gov/idoa/2352.htm>.



# Minority and Women's Business Enterprises

Prime contractors must ensure that the proposed subcontractors meet the following criteria:

- Are listed in the IDOA Directory of Certified Firms, on or before the proposal due date, national diversity plans are generally not accepted. The directory can be found here:  
<http://www.in.gov/idoa/mwbe/2743.htm>
- **Serve a Valuable Scope Contribution (VSC) on the engagement, as confirmed by the State.**
- Provide the goods or services specific to the contract and within the industry area for which it is certified



# Minority and Women's Business Enterprises

Prime contractors should note the following:

- Subcontractors' MBE/WBE Certification Letter, provided by IDOA, must accompany the proposal to show current status of certification.
- Each firm may only serve as one classification – MBE or WBE (see section 1.21)
- Pursuant to 25 IAC 5-6-2(b)(d), a Prime Contractor who is a MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.



# STATE OF INDIANA MBE/WBE SUBCONTRACTOR COMMITMENT FORM

RFS# \_\_\_\_\_

DUE DATE: \_\_\_\_\_

TOTAL BID AMOUNT: \_\_\_\_\_

<input type="checkbox"/> MBE Firm	<input type="checkbox"/> WBE Firm		
Company Name:		Contact Person:	
Address:		E-mail:	
Sub-Contract Amount:		Telephone Number: ( )	Fax Number: ( )
Sub-Contract Percentage of Total Bid:		Describe service/product to be provided and <u>how this is a Valuable Scope Contribution of the Contract:</u>	
Provide approximate dates when Sub-Contractor will perform on this project:			

<input type="checkbox"/> MBE Firm	<input type="checkbox"/> WBE Firm		
Company Name:		Contact Person:	
Address:		E-mail:	
Sub-Contract Amount:		Telephone Number: ( )	Fax Number: ( )
Sub-Contract Percentage of Total Bid:		Describe service/product to be provided and <u>how this is a Valuable Scope Contribution of the Contract:</u>	
Provide approximate dates when Sub-Contractor will perform on this project:			

Respondent Firm	Telephone Number
Address	Fax Number
City/State/Zip Code	Email Address
Representative	Authorizing Signature
Date	Printed Name and Title

☐ Please check if additional forms are attached.  
Page \_\_\_\_\_ of \_\_\_\_\_

FORM MUST BE COMPLETED IN ITS ENTIRETY WITH COMPLETED LETTERS OF COMMITMENT.



# Minority and Women's Business Enterprises

## STATE OF INDIANA MBE/WBE SUBCONTRACTOR COMMITMENT FORM

RFS#

DUE DATE:

TOTAL BID AMOUNT:

☐ MBE Firm ☐ WBE Firm

Company Name:

Address:

Sub-Contract Amount:

Sub-Contract Percentage of Total Bid:

Contact Person:

E-mail:

Telephone Number:  
( )

Fax Number:  
( )

Describe service/product to be provided and how this is a Valuable Scope Contribution of the Contract:

Provide approximate dates when Sub-Contractor will perform on this project:





# Minority and Women's Business Enterprises

- Effective August, 2014, a new MWBE scoring methodology will be utilized for all RFP's released
- **New Process** - MWBE scoring is conducted based on 10 points plus a possible 2 bonus points scale
  - MBE: Possible 5 points + 1 bonus point
  - WBE: Possible 5 points + 1 bonus Point

- **Professional Services Scoring Methodology:**

- The points will be awarded on the following schedule:

%	1%	2%	3%	4%	5%	6%	7%	8%
Pts.	.625	1.25	1.875	2.5	3.125	3.75	4.375	5.0

- Fractional percentages will be rounded up or down to the nearest whole percentage
- If the respondent's commitment percentage is rounded down to 0% for MBE or WBE participation the respondent will receive 0 points.
- Submissions of 0% participation will result in a deduction of 1 point in each category
- The highest submission which exceeds the goal in each category will receive 6 points (5 points plus 1 bonus point). In case of a tie both firms will receive 6 points



# IDOA Subcontractor Scoring

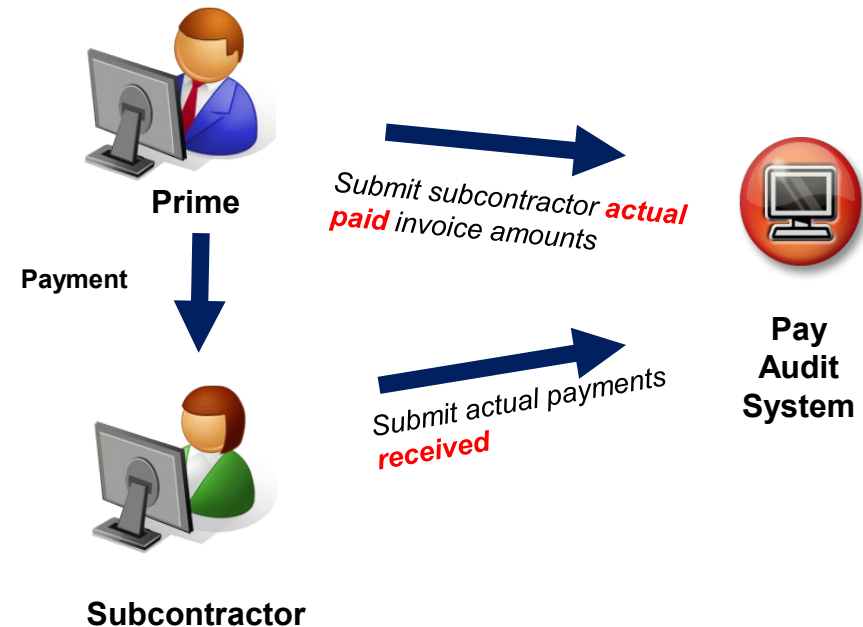
RFS MWBE Scoring Example

Bidder	MBE %	Pts.	WBE %	Pts.	Total Pts.
Bidder 1	12.0%	5.0	10.0%	6.0	11.0
Bidder 2	6.0%	3.75	4.0%	2.5	6.25
Bidder 3	8.0%	5.0	8.0%	5.0	10.0
Bidder 4	16.0%	6.0	0.2%	0.0	6.0
Bidder 5	0.0%	-1.0	0.0%	-1.0	-2.0

# Subcontractor Compliance

## Pay Audit System

- Tool utilized to monitor the state's diversity spend for subcontractors
- Selected primes and subcontractors are required to report payments submitted or received through this web-based tool
- Based on contract terms payments should be reported monthly or quarterly
- Questions? Contact Division of Supplier Diversity
  - [mwbecompliance@idoa.in.gov](mailto:mwbecompliance@idoa.in.gov)
  - [www.in.gov/idoa/mwbe/payaudit.htm](http://www.in.gov/idoa/mwbe/payaudit.htm)



# Additional Information

## IDOA PROCUREMENT LINKS AND NUMBERS

<http://www.in.gov/idoa/2354.htm>

For Buy Indiana Questions/Registration

<http://www.in.gov/idoa/2467.htm>

- Link to the developing for bidder registry with IDOA and Secretary of State.
  - <http://www.in.gov/idoa/2464.htm>
- Secretary of State of Indiana:
  - Can be reached at (317) 232-6576 for registration assistance. [www.in.gov/sos](http://www.in.gov/sos)
- See Vendor and Supplier Resource Center:
  - <http://www.in.gov/idoa/3106.htm>
- Minority and Women Owned Business Enterprises:
  - Link to more information and full listing of IDOA Minority and Women Owned Businesses <http://www.in.gov/idoa/2352.htm>
- RFS posting and updates:
  - Go to <http://www.in.gov/idoa/2354.htm> (select “Current Opportunities” link)
  - Scroll through table until you find desired RFS number on left-hand side and click the link.



# QUESTIONS

Any verbal response is not considered binding; respondents are encouraged to submit any question formally in writing if it affects the proposal that will be submitted to the state.

No questions will be taken today regarding the scope of work for this project. Today's session is meant to cover process-related topics (i.e. How to fill out IDOA forms).

