



# STATE OF INDIANA

Request for Services 18-023

INDIANA DEPARTMENT  
OF ADMINISTRATION

On Behalf Of  
INDIANA BUREAU OF MOTOR VEHICLES

Solicitation For:  
BMV/C STARS SYSTEM MODERNIZATION

Response Due Date: FEBRUARY 14, 2018

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## Table of Contents

SECTION ONE GENERAL INFORMATION AND REQUESTED PRODUCTS/SERVICES .....	5
1.1 INTRODUCTION.....	5
1.2 DEFINITIONS AND ABBREVIATIONS .....	5
1.2.1 BMV/C SPECIFIC ABBREVIATIONS AND DEFINITIONS .....	6
1.3 PURPOSE OF THE RFS.....	7
1.4 SUMMARY SCOPE OF WORK.....	7
1.4.1 BACKGROUND.....	8
1.4.2 BMV/C SYSTEM MODERNIZATION.....	8
1.4.2.1 MODERNIZATION GUIDING PRINCIPLES.....	8
1.4.2.2 MODERNIZATION COMPONENTS .....	9
1.4.2.3 ESTIMATED PROJECT TIMELINE.....	11
1.4.3 GALAXY SCOPE OF WORK.....	11
1.4.3.1 PHASE 1 - STARS TECHNICAL ARCHITECTURE DESIGN AND BUSINESS PROCESS REDESIGN .....	11
1.4.3.2 PHASE 2 - BUSINESS AND TECHNICAL REQUIREMENTS.....	19
1.4.3.3 PHASE 3 - GALAXY MODERNIZATION IMPLEMENTATION.....	21
1.5 LETTER OF INTENT .....	22
1.6 RFS OUTLINE .....	22
1.7 PRE-PROPOSAL CONFERENCE .....	23
1.8 STARS SYSTEM DEMONSTRATION .....	23
1.9 QUESTION/INQUIRY PROCESS.....	23
1.9.1 FINAL RFS QUESTIONS/INQUIRIES.....	24
1.10 DUE DATES.....	24
1.11 MODIFICATION OR WITHDRAWAL OF OFFERS .....	25
1.12 PRICING .....	25
1.13 PROPOSAL CLARIFICATIONS AND DISCUSSIONS, AND CONTRACT DISCUSSIONS .....	25
1.14 BEST AND FINAL OFFER.....	26
1.15 REFERENCE SITE VISITS .....	26
1.16 TYPE AND TERM OF CONTRACT .....	26
1.17 CONFIDENTIAL INFORMATION .....	26
1.18 TAXES.....	27
1.19 PROCUREMENT DIVISION REGISTRATION.....	27
1.20 SECRETARY OF STATE REGISTRATION.....	27

1.21	COMPLIANCE CERTIFICATION.....	27
1.22	EQUAL OPPORTUNITY COMMITMENT.....	27
1.23	MINORITY & WOMEN'S BUSINESS ENTERPRISES RFS SUBCONTRACTOR COMMITMENT (MWBE).....	28
1.24	INDIANA VETERAN OWNED SMALL BUSINESS SUBCONTRACTOR COMMITMENT (IVOSB).....	29
1.25	AMERICANS WITH DISABILITIES ACT.....	30
1.26	SUMMARY OF MILESTONES.....	30
1.27	EVIDENCE OF FINANCIAL RESPONSIBILITY (25 IAC 1.1-1-5).....	31
1.28	CONFLICT OF INTEREST.....	32
	SECTION TWO PROPOSAL PREPARATION INSTRUCTIONS.....	33
2.1	GENERAL.....	33
2.2	TRANSMITTAL LETTER.....	34
2.2.1	AGREEMENT WITH REQUIREMENT LISTED IN SECTION 1.....	34
2.2.2	SUMMARY OF ABILITY AND DESIRE TO SUPPLY THE REQUIRED PRODUCTS OR SERVICES.....	34
2.2.3	SIGNATURE OF AUTHORIZED REPRESENTATIVE.....	34
2.2.4	RESPONDENT NOTIFICATION.....	34
2.2.5	CONFIDENTIAL INFORMATION.....	34
2.2.6	OTHER INFORMATION.....	35
2.3	BUSINESS PROPOSAL.....	35
2.3.1	BUSINESS INFORMATION.....	35
2.3.1.1	GENERAL (OPTIONAL).....	35
2.3.1.2	RESPONDENT'S COMPANY STRUCTURE.....	35
2.3.1.3	COMPANY FINANCIAL INFORMATION.....	35
2.3.1.4	INTEGRITY OF COMPANY STRUCTURE AND FINANCIAL REPORTING.....	36
2.3.1.5	CONTRACT TERMS/CLAUSES.....	36
2.3.1.6	REFERENCES.....	37
2.3.1.7	REGISTRATION TO DO BUSINESS.....	38
2.3.1.8	AUTHORIZING DOCUMENT.....	39
2.3.1.9	SUBCONTRACTORS.....	39
2.3.1.10	EVIDENCE OF FINANCIAL RESPONSIBILITY.....	40
2.3.1.11	GENERAL INFORMATION.....	40
2.3.1.12	EXPERIENCE SERVING STATE GOVERNMENTS.....	40
2.3.1.13	EXPERIENCE SERVING SIMILAR CLIENTS.....	40

2.3.1.14	INDIANA PREFERENCES.....	40
2.3.1.15	PAYMENT .....	41
2.3.2	CONTRACT REVISIONS .....	41
2.4	TECHNICAL PROPOSAL.....	41
2.5	COST PROPOSAL.....	50
2.6	INDIANA ECONOMIC IMPACT .....	50
2.7	BUY INDIANA INITIATIVE/INDIANA COMPANY .....	50
SECTION THREE PROPOSAL EVALUATION .....		52
3.1	PROPOSAL EVALUATION PROCEDURE.....	52
3.2	EVALUATION CRITERIA.....	52
3.2.1	ADHERENCE TO REQUIREMENTS - PASS/FAIL.....	54
3.2.2	MANAGEMENT ASSESSMENT/QUALITY.....	54
3.2.3	PRICE .....	54
3.2.4	INDIANA ECONOMIC IMPACT (5 POINTS) .....	54
3.2.5	BUY INDIANA INITIATIVE (5 POINTS).....	54
3.2.6	MINORITY (5 POINTS) AND WOMEN'S BUSINESS (5 POINTS) SUBCONTRACTOR COMMITMENT (10 POINTS) .....	55
3.2.7	INDIANA VETERAN OWNED SMALL BUSINESS SUBCONTRACTOR COMMITMENT (5 POINTS) .....	55
3.2.8	QUALIFIED STATE AGENCY PREFERENCE SCORING.....	56

**SECTION ONE  
GENERAL INFORMATION AND REQUESTED PRODUCTS/SERVICES**

1.1 INTRODUCTION

In accordance with Indiana statute, including IC 5-22-9, the Indiana Department of Administration (IDOA), acting on behalf of the Indiana Bureau of Motor Vehicles/Commission (BMV/C), requires a modernized core motor vehicles system for the Indiana BMV/C. It is the intent of IDOA to solicit responses to this Request for Services (RFS) in accordance with the statement of work, proposal preparation section, and specifications contained in this document.

The BMV/C is seeking to modernize their motor vehicles system, the System Tracking and Record Support (STARS) system, in three (3) phases. The phases of the STARS modernization project, called Galaxy, are described in [Section 1.4.3](#). The purpose of this RFS is to obtain a vendor to perform the services and complete the deliverables for **Phase 1 only**.

IDOA **developed** this RFS in two (2) stages. The first stage released the draft RFS to solicit feedback from vendors regarding the quality of the overall requirements (**Attachment F1 and F2**), namely that they are clear, manageable, and achievable. The BMV/C also **sought** feedback as to whether certain requirements add risks, complexity, and avoidable cost impacts to the project. **This represents the final RFS that incorporates** changes to address the vendor concerns shared during the draft RFS period.

This RFS is being posted to the IDOA website (<http://www.IN.gov/idoa/2354.htm>) for downloading. A nominal fee will be charged for providing hard copies. Neither this RFS nor any response (proposal) submitted hereto are to be construed as a legal offer.

1.2 DEFINITIONS AND ABBREVIATIONS

The following is an explanation of terms and abbreviations appearing throughout this RFS. Other special terms may be used in the RFS, but they are more localized and defined where they appear, rather than in the following list:

Award Recommendation	IDOA's summary to the agency being supported, typically in letter format, of the solicitation and suggestion on vendor selection for the purposes of beginning contract negotiations
IAC	Indiana Administrative Code
IC	Indiana Code
Contract Award	The acceptance of IDOA's Award Recommendation by the agency being supported in conjunction with the public posting of the Award Recommendation
CUF	Commercially Useful Function - A business function that supports the scope of this solicitation

Full Time Equivalent (FTE)	The State defines FTE as a measurement of an employee's productivity when executing the scope of work in this RFS for a specific project or contract. An FTE of 1 would mean that there is one (1) worker fully engaged on a project. If there are two (2) employees each spending half of their working time on a project that would also equal 1 FTE
Implementation	The successful implementation of a modernized core motor vehicles system at the Indiana Government Center as specified in the contract resulting from this RFS
Installation	The delivery and physical setup of products or services requested in this RFS
Other Governmental Body	An agency, board, branch, bureau, commission, council, department, institution, office, or other establishment of any of the following: 1) The judicial branch 2) The legislative branch 3) A political subdivision (includes towns, cities, local governments, etc.) 4) A state educational institution
Products	Tangible goods or manufactured items as specified in this RFS
Proposal	An offer as defined in IC 5-22-2-17
Respondent	An offeror as defined in IC 5-22-2-18. The State will not consider a proposal responsive if two (2) or more offerors submit a joint or combined proposal. One (1) entity or individual must be clearly identified as the Respondent who will be ultimately responsible for performance of the contract
Services	Work to be performed as specified in this RFS
State	The State of Indiana
State Agency	As defined in IC 4-13-1, "state agency" means an authority, board, branch, commission, committee, department, division, or other instrumentality of the executive, including the administrative, department of State government
Total Bid Amount	The amount that the Respondent proposes on Attachment D that represents their total, all-inclusive price
Vendor	Any successful Respondent selected as a result of the procurement process to deliver the products or services requested by this RFS

### 1.2.1 BMV/C SPECIFIC ABBREVIATIONS AND DEFINITIONS

For the purpose of this RFS, the following terms and abbreviations will be assigned the following meanings:

AAMVA	American Association of Motor Vehicle Administrators
ARIES	Automated Reporting Information Exchange System
BMV/C	Indiana Bureau of Motor Vehicles and Bureau of Motor Vehicles Commission
CDLIS	Commercial Driver's License Information System
CSR	Customer Service Representative - Employee of the State who performs credential and vehicle transactions for customers in the State's branch locations

CSTIMS	Commercial Skills Test Information Management System
EDMS	Electronic Document Management Solution
Fortis	Database that houses the images of all documents received by the BMV
Galaxy	The modernization of the BMV/C STARS system
IDACS	Indiana Data and Communications System (State Police Computer System)
IDOA	Indiana Department of Administration
IDOC	Indiana Department of Corrections
INDOT	Indiana Department of Transportation
IOT	Indiana Office of Technology - State agency that establishes the standards for the technology infrastructure of the State and the security requirements for that technology
ISP	Indiana State Police
ITD	Information Technology Department - Department within the BMV/C responsible for maintaining and supporting BMV/C technical systems
Kofax	Document capture software
NMVTIS	National Motor Vehicle Title Information System
PDPS	Problem Driver Pointer System
RFC	Request for Change
S2S	State-to-State - System that allows state motor vehicle administrations to determine whether or not an individual holds multiple credentials at the time of application
STARS	System Tracking and Record Support system

### 1.3 PURPOSE OF THE RFS

The purpose of this RFS is to select a vendor that can satisfy the State's need for a modernized core motor vehicles system. It is the intent of the Indiana BMV/C to contract with a qualified vendor to provide a comprehensive, state of the art motor vehicles system to the Indiana BMV/C.

### 1.4 SUMMARY SCOPE OF WORK

The BMV/C intends to modernize the core BMV/C STARS system in order to better serve and support its customers. Currently there are 980 branch employees and 400 central office employees with access to STARS. Because of the large scope of this project and to ensure success in this endeavor, the BMV/C is planning a staged, multi-phased modernization effort that prioritizes and schedules the planned work over multiple years. This staged approach is designed to mitigate risks to current operations, prevent system downtime, and improve functionality over time. This modernization of the BMV/C STARS system will be known as the Galaxy project.

The Galaxy project is defined in detail in [Section 1.4.3](#) Galaxy Scope of Work.

## 1.4.1 BACKGROUND

The Indiana BMV/C is Indiana's second largest agency and serves Indiana residents in 132 branches within 92 counties. Annually, the BMV/C transaction volumes are:

- Approximately 13.3 million total transactions
  - 7.6 million vehicle registrations
  - 2.2 million vehicle titles
  - 1.7 million driver's licenses
  - 1.8 million additional transactions including customer maintenance, dealer transactions, information requests, financial transactions, placard issuance, and other miscellaneous transactions
- Between 1.3 and 3 million license plates issued
- **Over 2 million calls from residents received by the BMV/C contact center**

The BMV/C's central office manages driver's education and safety programs, including driver's education schools, motorcycle safety programs, and various skills examinations.

## 1.4.2 BMV/C SYSTEM MODERNIZATION

In 2016, the BMV/C launched a strategic initiative to modernize their systems and processes. The BMV/C issued a Modernization Request for Information (RFI) soliciting vendors to share solutions and services that could be incorporated into the BMV/C's Systems Modernization initiative. As a result of this RFI, the BMV/C has developed a BMV/C Systems Modernization Roadmap that is focused around the modernization of the BMV/C's core information system, STARS, along with BMV/C data sources and ancillary systems/services.

The BMV/C System Modernization Roadmap evaluated each BMV/C system and service contract and seeks to sequence modernization starting with STARS, with the exception of systems and services with upcoming contract expiration dates that necessitate early evaluation and updates.

### 1.4.2.1 MODERNIZATION GUIDING PRINCIPLES

The BMV/C System Modernization initiative is envisioned as a technical and business upgrade to facilitate streamlined, modern, business operations. A successful BMV/C System Modernization implementation will achieve:

- Accurate and secure data
- Consistent and accurate processing
- Limit **adverse** impact to internal and external customers
- Seamless transition
- Real to near real-time reporting (within 0.1 seconds)
- Ongoing maintenance primarily through configuration rather than customization
- Full compliance with all business and technical requirements
- Incorporation of private and public industry best practices



The BMV/C System Modernization initiative seeks to leverage existing technology currently in use within the State of Indiana and the BMV/C when feasible. The goal is to develop a flexible, yet scalable solution that will meet the needs of the BMV/C today and into the future. For this reason, the BMV/C is interested in cloud hosted Commercial off the Shelf (COTS) configurable solution, where feasible, **to promote flexibility and streamline ongoing maintenance processes.**

#### 1.4.2.2 MODERNIZATION COMPONENTS

The BMV/C System Modernization will be achieved through a series of projects. The following is a description of the planned service vendors and modules for the State of Indiana's BMV to achieve the BMV/C System Modernization. Services and modules may be added or removed at the discretion of the BMV as the Modernization initiative progresses.

##### **STARS Modernization (Galaxy)**

STARS has been fully implemented since 2006. In late 2014, the BMV/C engaged BKD to conduct an independent assessment with the objective being to develop a proposed project scope for the BMV/C management's consideration. Issues were raised in the BKD report related to the BMV/C Data Warehouse and Decision Support System. In addition to the operational assessment released in 2015, Sondhi Solutions, LLC, was commissioned to conduct a BMV/C Feasibility and Architectural Study.

**The BKD Assessment and BMV/C Feasibility and Architectural Study are available in the Bidder's Library. These documents provide information regarding the existing STARS technical architecture and technology as well as some of the current end user challenges.**

As a result, the BMV/C envisions a new STARS modernization project called Galaxy. At this time, the BMV/C plans to address modernization through the remediation and upgrade of the existing STARS system **rather than a complete system replacement.** The STARS upgrade will explore **potentially** introducing COTS products to improve the configurability of STARS. COTS modules currently under consideration include, but are not limited to:

- Rules Engine
- Correspondence Generator
- Workflow Management
- **Customer Relationship Management**

The Galaxy Modernization vendor will establish the governance standards, technical architecture platform standards, and systems integration standards. These standards will be utilized by all vendors when implementing and integrating their solutions within the BMV/C Modernization landscape.

In addition, the Galaxy Modernization vendor will be responsible for performing Business Process Redesign (BPR). The results of the BPR will be incorporated into the Galaxy Modernization vendor's plan for the BMV/C's modernized landscape

## **Data Management Architecture Assessment**

The BMV/C is currently procuring a vendor to perform a Data Management Architecture Assessment. The Data Management Architecture Assessment will include the following deliverables:

- Data Management Architecture Gap Analysis
- Data Governance Plan
- Data Management Architecture Design Plan to address identified Data Architecture gaps
- “Big Data” Assessment

## **Electronic Document Management Solution**

The BMV/C’s current Electronic Document Management Solution (EDMS) is reaching its end of life. The BMV/C EDMS project will procure a new EDMS to support future state business processes that have been defined by the BMV/C. The BMV/C intends to implement the new EDMS by December 31, 2018.

## **Vehicle Valuation and Vehicle Identification Number Decoding**

The BMV/C will purchase Vehicle Valuation and Vehicle Identification Number (VIN) Decoding services. Vehicle Valuation will provide Manufacturer’s Suggested Retail Price (MSRP) information for vehicles, motorcycles, trucks, boats, and recreational vehicles (RVs). VIN Decoding services will provide VIN validation and decoding for vehicles, motorcycles, trucks, boats, and RVs.

## **Data Warehouse and Business Intelligence/Decision Support Services**

Following the completion of the Data Management Architecture Assessment, the BMV/C may purchase an additional solution and/or services to address the Data Warehouse and Business Intelligence/Decision Support Service gaps.

## **Project Management Modernization Office (PMMO)**

The Project Management Modernization Office will be responsible for coordinating the BMV/C modernization projects to improve organizational performance and efficiency and to provide oversight of the design, development, and implementation (DDI) of the services rendered to the State under the contracts awarded through the other modernization projects.

## **Independent Verification and Validation (IV&V)**

The IV&V vendor will work closely with the PMMO to review and provide oversight of all BMV/C modernization projects.

As BMV/C system and service contracts expire, the BMV/C will require all vendors to align their solutions and services to the modernization efforts. As feasible, the BMV/C will

sequence procurements and contract renewals to address the modernizations changes that are required by each vendor. In the event that the timing of a procurement or contract precedes major components of the Galaxy Modernization, the BMV/C will provide the vendors with information on upcoming changes as soon as possible. The expectation of the BMV/C is that all BMV/C vendors will work together to make the modifications necessary to meet the Galaxy Modernization goals.

### 1.4.2.3 ESTIMATED PROJECT TIMELINE

The following is a draft timeline outlining the planned project schedule for the BMV/C Systems Modernization initiative. This timeline is intended to provide a general understanding of the project sequence and may be modified at the discretion of the BMV/C and IDOA.



### 1.4.3 GALAXY SCOPE OF WORK

The following sections define the three (3) phases of the Galaxy project. **Note: the scope of this RFS is limited to Phase 1 of the Galaxy project. The Phase 1 respondent will not be precluded from bidding on Phase 2 and 3 of this project.**

#### 1.4.3.1 PHASE 1 - STARS TECHNICAL ARCHITECTURE DESIGN AND BUSINESS PROCESS REDESIGN

Phase 1 will result in the development of **as-is and to-be core motor vehicles business process maps**, a STARS System Architecture Gap Analysis, **and** a STARS System Architecture and Technical Modernization Design Plan.

## **Business Process Analysis and Redesign**

The BMV/C requires the STARS System Modernization vendor to conduct Business Process Analysis and Redesign. This Business Process Analysis and Redesign serve as a complementary activity to the STARS System Architecture Gap Analysis and the STARS System Architecture and Technical Modernization Design Plan.

### **Business Process Analysis:**

The scope of business process analysis includes business process mapping and analysis of all current processes necessary for the BMV/C to fulfill its statutory charges as defined in Title IX. **Process groups to be mapped include but are not limited to:**

- Registrations
- Titles
- Credentials
- Records
- Finance
- Call Center
- General (e.g., customer account creation)
- Other (document scanning)

An illustrative organizational chart of the BMV/C is included in the Bidder's Library. Each category contains approximately thirty to forty (30 - 40) transactions/processes. While the number is high, each transaction category has one to three (1 - 3) foundation transactions upon which all other transactions are based. Mapping the foundation transactions essentially maps the secondary transactions with minor edits. Each transaction area has two to four (2 - 4) SME's to interview and work with for process mapping.

A sampling of business process maps have been developed as part of previous assessments. Business Process maps were also developed to evaluate the Electronic Document Management System. The assessment documents and process maps are available in the Bidder's Library. In addition, Bidders may refer to the copy of all current BMV operations policies and procedures included in the Bidder's Library to improve their understanding of the scope of the BMV operations.

Although the selected vendor may reference this information, the goal of this Business Process Analysis activity is to have the STARS System Architecture and Technical Modernization vendor design, develop and analyze a common/standardized set of all business processes, practices, and requirements supporting the statutory charges of the BMV/C. As part of the business process mapping, the vendor will also be required to capture any manual processes or workarounds that are used when a STARS ancillary system, service or data source is unavailable. The selected vendor will provide an inventory of the volume of transactions associated with each business process during the Business Process Analysis. The results of business process analysis are intended to provide the BMV/C and the vendor with an understanding of the current transactional opportunities. The vendor is expected to incorporate this knowledge into the STARS System Architecture Gap Analysis and the STARS System Architecture and Technical Modernization Design Plan.

The business process analysis deliverables include:

- An approved list of all transactions and processes included in the scope of this activity
- As-is business process maps for all transactions and processes defined in the scope document defined above. Business Process maps will be documented in Business Process Modeling Notation (BPMN) using MS Office Visio 2016.
- Inventory list of all as-is business process maps with corresponding transaction volumes for each map

### **Business Process Improvement and Redesign:**

In addition to addressing the improvement of current processes in the STARS Architecture Gap Analysis and the STARS System Architecture and Technical Modernization Design Plan, the BMV/C is interested in addressing recommendations for business process improvement and redesign that introduce interim, and possibly immediate efficiencies prior to the redesign of STARS. The vendor is expected to incorporate the business process transaction information in their prioritization of recommendations. Upon approval of the recommendations, the STARS Modernization vendor will develop to-be business processes based on the approved recommendations.

The Business Process Improvement and Redesign deliverables include:

- Business Process Improvement and Redesign Recommendations and Finding Report
- To-be business process maps for all approved recommendations

### **The BPR deliverables will be input into Phase 2 - Business and Technical Requirements.**

The BMV/C is placing a high priority on completing the STARS System Architecture Gap Analysis and the STARS System Architecture and Technical Modernization Design Plan. Therefore, the vendor may stage the completion of business process analysis to ensure that

the Gap Analysis and Design Plan is completed first, to be followed by the completion of the Business Process Redesign deliverables for this project.

**Business Process Team Lead:**

The BMV/C recognizes the need for the BMV/C to work with the vendor to facilitate the business process activities. For this reason, the BMV/C will appoint a Business Process Team Lead from the PMMO to work with the vendor to ensure BMV/C resource availability, track assigned tasks and deliverables, and serve as the focal point for vendor communications with respect to the business process analysis and redesign effort.

The Business Process Team Lead will serve as the liaison between the vendor project team and the BMV/C departments participating in business process activities. The BMV/C personnel who will be assigned will have the skills necessary to participate in the Business Process Improvement and Redesign activity. These skills include knowledge of the business processes being reviewed and knowledge of the existing administrative systems.

**STARS System Modernization Technical Architecture Design**

The STARS System Modernization Technical Architecture Design will be comprised of two (2) major deliverables:

- STARS System Architecture Gap Analysis
- STARS System Architecture and Technical Modernization Plan

The scope of this design will include the STARS system and the STARS interfaces as described in the following diagram:



## STARS System Architecture Gap Analysis

The STARS System Architecture Gap Analysis will assess the current STARS System Architecture, define the technical architecture needed to achieve the BMV/C's modernization vision for STARS and provide a detailed explanation of the gaps. In addition, the gap analysis will develop recommendations to resolve each gap. At a minimum, the Gap Analysis will address the following:

- STARS configuration (hardware, software, work stations)
- Mechanisms, internal or external to the BMV/C, for system-to-system communication
- Data standards
- Security and privacy mechanisms and standards
- Standards, policies, and procedures governing STARS/Galaxy throughout the entire System Development Life Cycle (SDLC) to include:
  - Configuration management
  - Environments (Development, UAT, Staging, Training, Production)
  - Testing
  - Training
  - Code promotion

- Release management and maintenance
- Technical components to support the entire SDLC including:
  - Security
  - System administration
  - Configuration management
  - Environments (Development, UAT, Staging, Training, Production)
  - Testing
  - Training
  - Code promotion
  - Release management and maintenance
- Technology stack and network infrastructure
- BMV/C staff levels and skills

### STARS System Architecture and Technical Modernization Design Plan

The STARS System Architecture and Technical Modernization Design Plan will document the design and implementation plan for the modernized STARS architecture with a cost benefit analysis to justify the design recommendations. The vendor is expected to work with the BMV/C to develop an approach to build the cost benefit analysis, define the information needed for the evaluation, and incorporate evaluation results into the Design Plan.

The Design Plan should be aligned to the STARS Design guidelines presented in the table below:

Galaxy Principles	STARS Design Principles	
Ongoing maintenance primarily through configuration rather than customization  Full compliance with all business and technical requirements	Flexible Enterprise Technology Platform	Implement flexible, rule-based, configurable components and services to enhance decision-making, increase management efficiency, and promotes agile adaptability for new and evolving regulations, programs, and initiatives
Accurate and secure data  Real to near real-time (within 0.1 seconds) reporting	Centralized Data Repository	Provide dashboards and reports to enable real-time or near-time (within 0.1 seconds) access to transactional data to assist in operations and management decision making
Incorporation of private and public industry best practices  Full compliance with all business and technical requirements	Business-driven Enterprise transformation	Business functions must drive technical solutions and must be flexible to meet future needs including new regulations, legislation, and innovations



Galaxy Principles	STARS Design Principles	
<p>Consistent and Accurate Processing</p> <p>Limit <b>adverse</b> impact to internal and external customers</p>	Process Automation	Automate manual processes and eliminate human intervention wherever possible and utilize workflow tools to standardize business processes that guide internal and external users through process steps, activities, and tasks
<p>Accurate and secure data</p>	Data Integration and Interoperability	Promote reusable components by using open architecture and adopting industry and national standards for interoperability, integration, and data exchange
<p>Accurate and secure data</p> <p>Limit <b>adverse</b> impact to internal and external customers</p>	Data Consistency Across the Enterprise	Utilize a comprehensive data governance process to ensure consistent data management processes and policies across the BMV/C enterprise. Provide data that is timely, accurate, usable, and easily accessible in order to support analysis and decision making for management and program administration
<p>Limit <b>adverse</b> impact to internal and external customers</p>	Progressive Technology	Implement services that will allow the BMV/C to take advantage of progressive technology (access via mobile devices, mobile apps, instant messenger, etc.) to improve how it interacts and communicates with customers
<p>Limit <b>adverse</b> impact to internal and external customers</p>	Customer Centric Focus	Implement solutions that provide an easy to access and comprehensive portal for customers and other stakeholders that promotes self-service functionality. The solution would leverage role-based security to make sure stakeholders have access to only the information required for their needs.

This design and implementation plan should address all gaps identified in the STARS System and Architecture Gap Analysis, including:

- STARS configuration (hardware, software, work stations)
- Mechanisms, internal and external to the BMV/C, for system-to-system communication
- Data standards
- Security and privacy mechanisms and standards

- Standards, policies, and procedures governing STARS/Galaxy throughout the entire SDLC to include
  - Configuration management
  - Environments (Development, UAT, Staging, Training, Production)
  - Testing
  - Training
  - Code promotion
  - Release management and maintenance
- Technical components to support the entire SDLC including:
  - Security
  - System administration
  - Configuration management
  - Environments (Development, UAT, Staging, Training, Production)
  - Testing
  - Training
  - Code promotion
  - Release management and maintenance
- Technology stack and network infrastructure
- Evaluation of existing staff levels and skills, number and type of staff, and knowledge and skill required for staff based on the maintenance and operations needs of the future system architecture

As the STARS System Modernization vendor embarks on the System Architecture Design Phase of this project, the BMV/C acknowledges that there are other BMV/C Modernization activities that are in progress. Namely, the Data Management Architecture Assessment and procurements for a replacement EDMS and Vehicle Valuation and VIN Validation solutions. The BMV/C expects the STARS System Modernization vendor to incorporate these ongoing activities into their STARS Architecture Gap Analysis and Architecture Plan, as applicable. The BMV/C will work with the STARS System Modernization vendor and any other entities to ensure necessary cooperation and collaboration with the STARS Systems Modernization vendor.

Specifically, while the independent Data Management Architecture Assessment is being provided in a separate scope of work, the BMV/C requests that the System Architecture Design vendor detail any data management observations or concerns identified during this STARS System Architecture Design Project. The BMV/C requires that the System Architecture Design vendor collaborate with the Data Management Architecture Assessment vendor to share data management observations and concerns and to capture data management related architecture requirements for inclusion in the STARS System and Technical Architecture Modernization Design Plan.

### **Impact to Phase 2 and Phase 3**

The Phase 1 deliverables will be used to more accurately plan Phase 2 and Phase 3. The Project scope and timeline will be reviewed and modified according to the STARS System Architecture Gap Analysis and STARS System Architecture and Technical Modernization Design Plan. The preferred SDLC methodology will also be confirmed at this time.

### 1.4.3.2 PHASE 2 - BUSINESS AND TECHNICAL REQUIREMENTS

**Note: The information in this section is for informational purposes only. The scope of this RFS is limited to Phase 1 of the Galaxy project. The scope and duration of this Phase are subject to change based on the results and recommendations from Phase 1 deliverables.**

During Phase 2 of the project, the Galaxy Modernization vendor will develop the Galaxy Modernization business and technical requirements, as defined in the following sections:

#### **Business Requirements**

A business requirement is any requirement (capability that a solution must provide or a condition that must be met) that stems from the business side of the agency. Business requirements describe what must be achieved to solve an organization’s problems. These become the criteria by which a delivered system is evaluated to determine its success. Moreover, well-defined business requirements become the starting point for setting stakeholder expectations and ongoing project communications. Consequently, well-defined business requirements are critical for a project team to be effective and are essential for a project to be successful.

The BMV/C anticipates the development of two (2) types of business requirements. Both types represent levels of detail in the requested business functionality: the first is a high-level view and the other is a more detailed view. Both levels are specified at different points during a project to identify what must be accomplished.

Type of Requirement	Characteristics
High-Level Business Requirements	<ul style="list-style-type: none"><li>▪ Provide little detail</li><li>▪ Conceptual in nature</li><li>▪ Serve the strategic management and decision-making process</li></ul>
Detailed Business Requirements	<ul style="list-style-type: none"><li>▪ Provide details and clarity that effectively communicates user needs and expectations</li><li>▪ Describe how business functions (such as billing) are to be performed and the expected results for users</li><li>▪ Are the critical component in the successful development of a solution</li></ul>

#### **Technical Requirements**

A technical requirement addresses the “hows” associated with business requirements (the “whats”). Technical requirements pertain to the technical aspect that the system must fulfill and do not result in observable behavior. They often address performance-related, reliability,

security, compliance, and availability issues. Technical requirements are further broken into functional and non-functional requirements.

### Functional Requirements

Functional requirements are processes and other specific functionality that define what a system is supposed to accomplish. These will require a system test. Functional requirements must be written as:

- Comprehensive descriptions of what the product or enhancement will do, how it is expected to perform, and its intended purpose as it relates to the specified business needs
- The system capabilities required to meet the information needs of end users
- The intended behavior of the product or enhancement
- “The system will do <function>, <task>, <service> the product or enhancement is required to perform.”

### Non-Functional Requirements

Non-functional requirements specify criteria that can be used to judge the operation of a system. Non-functional requirements are often called qualities of a system. Other terms for non-functional requirements are "constraints", "quality attributes", "quality goals", "quality of service requirements", and "non-behavioral requirements". These require User Acceptance Testing (UAT). Non-functional requirements will address:

- Performance
- Capacity
- Availability
- Reliability
- Integrity
- Recovery
- Compatibility
- Maintainability
- Usability

The technical requirements will be developed to the level of detail necessary to re-code STARS. This phase of the project will also result in the Requirements Traceability Matrix that will be used to implement STARS changes and execute QA and UAT. The Requirements Traceability Matrix will be maintained throughout the Galaxy Modernization effort. Refer to the Bidder’s Library Requirements Management Plan for additional information on the requirements expectations for the Galaxy Modernization project.

### **STARS System Architecture and Technical Modernization Design Plan Revisions**

The Galaxy Modernization vendor will evaluate the STARS System Architecture and Technical Modernization Design Plan developed in Phase 1 of the Galaxy project after the completion of the Business and Technical requirements have been developed. This evaluation will determine if the Design Plan is impacted by any Business and/or Technical

requirements. If there are impacts to the Design Plan, the Phase 2 vendor is required to revise the STARS System Architecture and Technical Modernization Design Plan.

#### 1.4.3.3 PHASE 3 - GALAXY MODERNIZATION IMPLEMENTATION

**Note: The information in this section is for information purposes only. The scope of this RFS is limited to Phase 1 of the Galaxy project. The scope and duration of this Phase are subject to change based on the results and recommendations from Phase 1 deliverables.**

The implementation of the Galaxy Modernization will include the following:

- Installation and configuration of any COTS products necessary to modernize STARS. COTS products could **potentially** include:
  - Rules Engine
  - Correspondence Generator
  - Workflow Management
  - **Customer Relationship Management**
- Custom development and/or configuration of STARS to include:
  - Databases
  - Interfaces
  - STARS Presentation Layer
  - myBMV
  - Self Service Terminals (SST)
- Deployment of modernized STARS to include:
  - Pilot Testing
  - Operational Readiness Review (ORR)
  - STARS Roll-Out
- Organizational Change Management to include:
  - **Cultural Assessment**
  - **System Access and Roles Matrix**
  - **Communication Plan**
  - STARS training for technical staff and STARS users

Current STARS documentation is available in the Bidder's Library. To access the Bidder's Library, interested Respondents must request access and complete a Non-Disclosure Agreement provided in Attachment H. To obtain a username and password to access the documents, email [rfp@idoa.in.gov](mailto:rfp@idoa.in.gov) with the following phase in the email subject line "NDA to RFS 18-023, BMV/C STARS System Modernization".

## 1.5 LETTER OF INTENT

Vendors that wish to reply to this RFS must submit an “Intent to Respond” form presented in Attachment I. The “Intent to Respond” form will be used by IDOA to schedule vendor software demonstrations for qualified vendors. The “Intent to Respond” form must be submitted in writing via email to [rfp@idoa.in.gov](mailto:rfp@idoa.in.gov) no later than **3:00 p.m. EST on October 26, 2017**. Any vendors who submit an “Intent to Respond” should include the following phrase in the email subject line: “Intent to Respond to RFS 18-023, BMV/C STARS System Modernization”.

## 1.6 RFS OUTLINE

The outline of this RFS document is described below:

Section	Description
Section 1 - General Information and Requested Products or Services	This section provides an overview of the RFS, general timelines for the process, and a summary of the products/services being solicited by the State/agency via this RFS
Section 2 - Proposal Preparation Instruction	This section provides instructions on the format and content of the RFS including a Letter of Transmittal, Business Proposal, Technical Proposal, and a Cost Proposal
Section 3 - Proposal Evaluation Criteria	This sections discusses the evaluation criteria to be used to evaluate Respondents’ proposals
Attachment A	M/WBE Participation Plan Form
Attachment A1	IVOSB Participation Plan Form
Attachment B	Sample Contract
<b>Attachment B1</b>	<b>Data/Information Security Policy for Contractors</b>
Attachment C	Indiana Economic Impact Form
Attachment D	Cost Proposal Template
Attachment E	Business Proposal Template
Attachment F1	Technical Proposal Requirements
Attachment F2	Technical Proposal Template
Attachment G	Q&A Template
Attachment H	Non-Disclosure Agreement
Attachment I	Intent to Respond Form
Attachment J	Customer Reference Form

## 1.7 PRE-PROPOSAL CONFERENCE

A pre-proposal conference will be held on **October 19, 2017** at **2:30 p.m. EST** in Indiana Government Center South Conference Center Room Number 19. At this conference, potential Respondents may ask questions about the RFS and the RFS process. Respondents are reminded that no answers issued verbally at the conference are binding on the State and any information provided at the conference, unless it is later issued in writing, also is not binding on the State.

## 1.8 STARS SYSTEM DEMONSTRATION

The BMV/C plans to provide a high-level STARS System Demonstration on **October 30, 2017** at **9:00 a.m. EST** in Indiana Government Center South Conference Room xx. During this conference, Respondents will be given a demonstration of key transactions performed in STARS. Potential Respondents may ask questions about STARS and the STARS processes during this demonstration. Respondents are reminded that no answers issued verbally are binding to the State and any information provided at the demonstration, unless it is later issued in writing, also is not binding to the State.

Respondents must complete and submit the required Non-Disclosure Agreement provided in Attachment H and the Intent to Respond Form provided in Attachment I prior to the demonstration date.

## 1.9 QUESTION/INQUIRY PROCESS

Following the question/inquiry due dates, Procurement Division personnel will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted to the IDOA website according to the RFS timetable established in [Section 1.26](#). The question/inquiry and answer link will become active after responses to all questions have been compiled. Only answers posted on the IDOA website will be considered official and valid by the State. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employee.

Inquiries are not to be directed to any staff member of the Indiana BMV/C, or any other participating agency. Such action may disqualify the Respondent from further consideration for a contract resulting from this RFS.

If it becomes necessary to revise any part of this RFS, or if additional information is necessary for a clearer interpretation of provisions of this RFS prior to the due date for proposals, an addendum will be posted on the IDOA website. If such addenda issuance is necessary, the Procurement Division may extend the due date and time for proposals to accommodate such additional information requirements, if required.

### 1.9.1 FINAL RFS QUESTIONS/INQUIRIES

All questions/inquiries regarding the final RFS must be submitted in writing by the deadline of **3:00 p.m. EST on December 20, 2017**. Questions/inquiries should be submitted using Attachment G, Q&A Template, via email to [rfp@idoa.in.gov](mailto:rfp@idoa.in.gov) and must be received by the time and date indicated above. Any vendors who submit comments should include the following phrase in the email subject line: "Questions for RFS 18-023, BMV/C STARS System Modernization".

Follow up questions/inquiries regarding the final RFS must be submitted in writing by the deadline of **3:00 pm EST on January 12, 2018**. Questions/inquiries should be submitted using Attachment G, Q&A Template, via email to [rfp@idoa.in.gov](mailto:rfp@idoa.in.gov) and must be received by the time and date indicated above. Any vendors who submit comments should include the following phrase in the email subject line: "Questions for RFS 18-023, BMV/C STARS System Modernization".

### 1.10 DUE DATES

All proposals for the final RFS must be received at the address below by the Procurement Division no later than **3:00 p.m. EST on February 14, 2018**. Each Respondent must submit **one (1) original CD-ROM (marked "Original") and six (6) complete copies on CD-ROM** of the proposal, **and five (5) printed copies of the full proposal** including the Transmittal Letter and other related documentation as required in this RFS. The **original CD-ROM** will be considered the official response in evaluating responses for scoring and protest resolution. **The Respondent's proposal response on this CD may be posted on the IDOA website, (<http://www.in.gov/idoa/2462.htm>) if recommended for selection.** Each copy of the proposal must follow the format indicated in [Section 2](#) of this document. Unnecessarily elaborate brochures or other presentations, beyond those necessary to present a complete and effective proposal, are not desired. All proposals must be addressed to:

**John E. Helmer IV**  
Indiana Department of Administration  
Procurement Division  
402 West Washington Street, Room W468  
Indianapolis, IN 46204

**If you hand-deliver solicitation responses:** To facilitate weapons restrictions at Indiana Government Center North and Indiana Government Center South, as of **July 21, 2008**, the public must enter IGC buildings through a designated public entrance. The public entrance to Indiana Government Center South is located at 10 N. Senate Avenue (East side of building). This entrance is equipped with metal detectors and screening devices monitored by Indiana State Police Capitol Police.

Passing through the public entrance may take some time. Please be sure to take this information into consideration if your company plans to submit a solicitation response in person.



**If you ship or mail solicitation responses:** United States Postal Express and Certified Mail are both delivered to the Government Center Central Mailroom, and not directly to the Procurement Division. It is the responsibility of the Respondent to make sure that solicitation responses are received by the Procurement Division at the Department of Administration's reception desk on or before the designated time and date. Late submissions will not be accepted. The Department of Administration, Procurement Division clock is the official time for all solicitation submissions.

Regardless of delivery method, all proposal packages must be **sealed** and clearly marked with the RFS number, due date, and time due. IDOA will not accept any unsealed bids. Any proposal received by the Department of Administration, Procurement Division after the due date and time will not be considered. Any late proposals will be returned, unopened, to the Respondent upon request. All rejected proposals not claimed within 30 days of the proposal due date will be destroyed.

No more than one (1) proposal per Respondent may be submitted.

The State accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.

#### 1.11 MODIFICATION OR WITHDRAWAL OF OFFERS

Modifications to responses for this RFS may only be made in the manner and format consistent with the submittal of the original response, acceptable to IDOA and clearly identified as a modification.

The Respondent's authorized representative may withdraw the proposal, in person, prior to the due date. Proper documentation and identification will be required before the Procurement Division will release the withdrawn proposal. The authorized representative will be required to sign a receipt for the withdrawn proposal.

Modification to, or withdrawal of, a proposal received by the Procurement Division after the exact hour and date specified for receipt of proposals will not be considered.

#### 1.12 PRICING

Pricing on this RFS must be firm and remain open for a period of not less than 180 days from the proposal due date. Any attempt to manipulate the format of the document, attach caveats to pricing, or submit pricing that deviates from the current format will put your proposal at risk.

Please refer to the [Section 2.5](#) Cost Proposal, for a detailed description of the proposal pricing format and requirements.

#### 1.13 PROPOSAL CLARIFICATIONS AND DISCUSSIONS, AND CONTRACT DISCUSSIONS

The State reserves the right to request clarifications on proposals submitted to the State. The State also reserves the right to conduct proposal discussions, either oral or written, with Respondents. These discussions could include a request for additional information, request for cost or technical proposal revision, etc. Additionally, in conducting discussions, the State may use information

derived from proposals submitted by competing Respondents only if the identity of the Respondent providing the information is not disclosed to others. The State will provide equivalent information to all Respondents which have been chosen for discussions. Discussions, along with negotiations with Respondents may be conducted for any appropriate purpose.

The Procurement Division will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

A sample contract is provided in Attachment B. Any requested changes to the sample contract must be submitted with your response (See [Section 2.3.2](#) for details). The State reserves the right to reject any of these requested changes. It is the State's expectation that any material elements of the contract will be substantially finalized prior to contract award.

#### 1.14 BEST AND FINAL OFFER

The State may request Best and Final Offers (BAFOs) from those Respondents determined by the State to be reasonably viable for contract award. However, the State reserves the right to award a contract on the basis of initial proposals received. Therefore, each proposal should contain the Respondent's best terms from a price and technical standpoint.

Following evaluation of the BAFOs, the State may select for final contract negotiations/execution the offers that are most advantageous to the State, considering cost and the evaluation criteria in this RFS.

#### 1.15 REFERENCE SITE VISITS

The State may request a site visit to a Respondent's working support center to aid in the evaluation of the Respondent's proposal. Site visits, if required will be discussed in the technical proposal.

#### 1.16 TYPE AND TERM OF CONTRACT

The State intends to sign a contract with one (1) Respondent to fulfill the requirements in this RFS.

The term of the contract shall be for a period that includes the **Phase 1 timeline** with the option to renew at the State's discretion.

#### 1.17 CONFIDENTIAL INFORMATION

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 *et seq.*, and, after the contract award, the entire RFS file may be viewed and copied by any member of the public, including news agencies and competitors. Respondents claiming a statutory exception to the APRA must indicate so in the Transmittal Letter. Confidential Information must also be clearly marked in a separate folder on any included CD-ROM. The Respondent must also specify which statutory exception of APRA applies. The State reserves the right to make determinations of confidentiality. If the Respondent does not identify the statutory exception, the Procurement Division will not consider the submission confidential. If the State does not agree that the information designated is confidential under any of the disclosure

exceptions to APRA, it may seek the opinion of the Public Access Counselor. Prices are not confidential information.

#### 1.18 TAXES

Proposals should not include any tax from which the State is exempt.

#### 1.19 PROCUREMENT DIVISION REGISTRATION

In order to receive an award, you must be registered as a Bidder with the Department of Administration, Procurement Division. Therefore, to ensure there is no delay in the award all Respondents are strongly encouraged to register prior to submission of their response. Respondents should go to [www.in.gov/idoa/2464.htm](http://www.in.gov/idoa/2464.htm) .

#### 1.20 SECRETARY OF STATE REGISTRATION

If awarded the contract, the Respondent will be required to register, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations and limited liability companies. Information concerning registration with the Secretary of State may be obtained by contacting:

Secretary of State of Indiana  
Business Services Division  
402 West Washington Street, E018  
Indianapolis, IN 46204  
(317) 232-6576  
[www.in.gov/sos](http://www.in.gov/sos)

#### 1.21 COMPLIANCE CERTIFICATION

Responses to this RFS serve as a representation that the Respondent has no current or outstanding criminal, civil, or enforcement actions initiated by the State, and it agrees that it will immediately notify the State of any such actions. The Respondent also certifies that neither it nor its principals are presently in arrears in payment of its taxes, permit fees, or other statutory, regulatory or judicially required payments to the State. The Respondent agrees that the State may confirm, at any time, that no such liabilities exist, and if such liabilities are discovered, the State may bar the Respondent from contracting with the State, cancel existing contracts, withhold payments to setoff such obligations, and withhold further payments or purchases until the entity is current in its payments on its liability to the State and has submitted proof of such payment to the State.

#### 1.22 EQUAL OPPORTUNITY COMMITMENT

Pursuant to IC 4-13-16.5 and in accordance with 25 IAC 5, Executive Order 13-04 and IC 5-22-14-3.5, it has been determined that there is a reasonable expectation for minority, women, and Indiana veteran business enterprise subcontracting opportunities on a contract awarded under this RFS. Therefore, a contract goal of 8% for Minority Business Enterprises, 8% for Women's Business Enterprises, and 3% for Veteran Business Enterprises have been established and all Respondents

will be expected to comply with the regulation set forth in 25 IAC 5, Executive Order 13-04 and IC 5-22-14-3.5.

Failure to address these requirements may impact the evaluation of your proposal.

### 1.23 MINORITY & WOMEN'S BUSINESS ENTERPRISES RFS SUBCONTRACTOR COMMITMENT (MWBE)

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 the use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of the 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 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.

Respondents are encouraged to contact and work with MWBED at (317) 232-3061 to design a subcontractor commitment to meet established goals as referenced in this solicitation.

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
- The Prime Contractor must include with their proposal the subcontractor's M/WBE Certification Letter provided by IDOA, to show the current status of certification
- Each firm may only serve as one (1) classification - MBE, WBE, or IVOSB (see [Section 1.24](#))
- 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 Commercially Useful Function (CUF). The firm must serve a value-added purpose on the engagement, as confirmed by the State
- Must provide goods or services 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 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 MWBE 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>.

#### 1.24 INDIANA VETERAN OWNED SMALL BUSINESS SUBCONTRACTOR COMMITMENT (IVOSB)

In accordance with Executive Order 13-04 and IC 5-22-14-3.5, it has been determined that there is a reasonable expectation of Indiana Veteran Owned Small Business subcontracting opportunities on a contract awarded under this RFS. The IVOSB Subcontractor Commitment Form is to be submitted alongside the Respondent’s proposal. The form must show that they are participating in the proposed contract and meet the requirements listed at the Veteran’s Business Program website (<http://www.in.gov/idoa/2862.htm>).

If participation is met through the use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of the 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 Attachment D, Cost Proposal Template.

Failure to address these goals may impact the evaluation of your Proposal. The Department reserves the right to verify all information included on the IVOSB Subcontractor Commitment Form.

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

- Must be listed on Federal Center for Veterans Business Enterprise ([VA OSDBU](#)) registry or listed on the [IDOA Directory of Certified Firms](#), **on or before** the proposal due date
- The Prime Contractor must include with their proposal the subcontractor’s veteran business Certification Letter provided by either IDOA or the Federal Government (VA OSDBU), to show current status of certification
- Each firm may only serve as one (1) classification - MBE, WBE (see [Section 1.23](#)) or IVOSB
- IVOSB must have a Bidder ID (see [Section 2.3.1.7 - Department of Administration, Procurement Division](#))

- A Prime Contractor who is an IVOSB 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 Commercially Useful Function (CUF). The firm must serve a value-added purpose on the engagement, as confirmed by the State
- Must provide goods or services only in the industry area for which it is certified as listed in the [VA OSDBU](#) or [IDOA Certified Firm](#) directories
- Must be used to provide the goods or services specific to the contract

Indiana Veteran owned small business RFS Subcontractor Letter of Commitment:

A signed letter(s), on company letterhead, from the IVOSB must accompany the IVOSB Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the IVOSB 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 State reserves the right to deny evaluation points if the letter(s) is not attached. 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 policies and processes involving the State’s IVOSB Program. Questions involving the regulations governing the IVOSB Subcontractor Commitment Form should be directed to: [indianaveteranspreference@idoa.in.gov](mailto:indianaveteranspreference@idoa.in.gov).

1.25 AMERICANS WITH DISABILITIES ACT

The Respondent specifically agrees to comply with the provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 *et seq.* and 47 U.S.C. 225).

1.26 SUMMARY OF MILESTONES

The following timeline is only an illustration of the RFS process. The dates associated with each step are not to be considered binding. Due to the unpredictable nature of the evaluation period, these dates are subject to change. After the evaluation process, all Respondents will be informed of the evaluation team’s findings.

Key RFS Dates

Activity	Date
Issue of Draft RFS	October 11, 2017
Pre-Proposal Conference	October 19, 2017
Deadline to Submit Non-Disclosure Agreement and Intent to Respond	October 26, 2017
STARS System Demonstration	October 30, 2017

Deadline to Submit Comments for the Draft RFS	November 15, 2017
Issue of Final RFS	December 11, 2017
Deadline to Submit Questions for Final RFS	December 20, 2017
Response to Written Questions for Final RFS	January 4, 2018
Deadline to Submit Follow Up Questions	January 12, 2018
Response to Written Follow Up Questions	January 23, 2018
Submission of Final RFS Proposals	February 14, 2018
The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.	
Proposal Evaluation	TBD
Proposal Discussions/Clarifications (if necessary)	TBD
Oral Presentations (if necessary)	TBD
Best and Final Offers (if necessary)	TBD
RFS Award Recommendation	TBD

1.27 EVIDENCE OF FINANCIAL RESPONSIBILITY (25 IAC 1.1-1-5)

If the contract is greater than one million dollars (\$1,000,000.00), financial surety or protection will be required. When appropriate and subject to the discretion of the purchasing agency, the purchasing agency will require the successful Respondent to submit evidence of financial responsibility prior to the submission of a fully executed contract. The evidence of financial responsibility shall not exceed 10% of the contract price.

Evidence of financial responsibility, in the amount of 10% of the contract not to exceed, shall be required to guarantee the performance of the selected Respondent prior to a fully executed contract. The evidence of financial responsibility, when required, must remain in effect for the duration of the contract including any/all renewals. The evidence of financial responsibility must be in the form of an irrevocable letter of credit, certified check, cashier's check, or a bond acquired from a surety company registered with the Indiana Department of Insurance or other evidence deemed acceptable by the State. Notwithstanding any other provisions relating to the beginning of the term, the contract shall not become effective until the evidence of financial responsibility required by the contract is delivered in the correct form and amount to IDOA Procurement. The evidence of financial responsibility must be submitted to the following address prior to contract execution:

Indiana Bureau of Motor Vehicles  
Indiana Government Center North  
Room 402  
100 North Senate Avenue  
Indianapolis, IN 46204

## 1.28 CONFLICT OF INTEREST

Any person, firm, or entity that assisted with and/or participated in the preparation of this RFS document is prohibited from submitting a proposal to this specific RFS. For the purposes of this RFS “person” means a state officer, employee, special state appointee, or any individual or entity working with or advising the State or involved in the preparation of this RFS proposal. This prohibition would also apply to an entity who hires, within a one (1) year period prior to the publication of this RFS, a person that assisted with and/or participated in the preparation of this RFS.



**SECTION TWO  
PROPOSAL PREPARATION INSTRUCTIONS**

2.1 GENERAL

To facilitate the timely evaluation of proposals, a standard format for proposal submission has been developed and is described in this section. All Respondents are required to format their proposals in a manner consistent with the guidelines described below:

- Each item must be addressed in the Respondent’s proposal
- The Transmittal Letter must be in the form of a letter. The business and technical proposals must be organized under the specific section titles as listed below
- The electronic copies of the proposal submitted via CD-ROM and a hard copy should be organized to mirror the sections below and the attachments
- Each item, i.e. Transmittal Letter, Business Proposal, Technical Proposal, Cost Proposal, etc., must be separate standalone electronic files on the CD-ROM. Please do not submit your proposal as one (1) large file
- Use the following naming convention for each file:

Form/File	File Naming Convention
Transmittal Letter	023transmittal_company name
Attachment A M/WBE Participation Plan Form	023atta_company name
Attachment A1 IVOSB Participation Plan Form	023atta1_company name
Attachment C Indiana Economic Impact Form	023attc_company name
Attachment D Cost Proposal Template	023attd_company name
Attachment E Business Proposal Template	023atte_company name
Attachment F2 Technical Proposal Template	023attf2_company name
Technical Proposal Narrative	023_company name_Technical Narrative
Attachment G Q&A Template	023attg_company name
Attachment H Non-Disclosure Agreement	023atth_company name
Attachment I Intent to Respond Form	023atti_company name
Attachment J Customer Reference Form	023attj_company name
Other	023_company name_file description

- Whenever possible, please submit all attachments in their original format
- Confidential Information must also be clearly marked in a separate folder/file on any included CD-ROM

## 2.2 TRANSMITTAL LETTER

The Transmittal Letter must address the following topics except those specifically identified as “optional.”

### 2.2.1 AGREEMENT WITH REQUIREMENT LISTED IN SECTION 1

The Respondent must explicitly acknowledge understanding of the general information presented in [Section 1](#) and agreement with any requirements/conditions listed in [Section 1](#).

### 2.2.2 SUMMARY OF ABILITY AND DESIRE TO SUPPLY THE REQUIRED PRODUCTS OR SERVICES

The Transmittal Letter must briefly summarize the Respondent’s ability to supply the requested products and/or services that meet the requirements defined in Attachment F1 of this RFS. The letter must also contain a statement indicating the Respondent’s willingness to provide the requested products and/or services subject to the terms and conditions set forth in the RFS including, but not limited to, the State’s mandatory contract clauses.

### 2.2.3 SIGNATURE OF AUTHORIZED REPRESENTATIVE

A person authorized to commit the Respondent to its representations and who can certify that the information offered in the proposal meets all general conditions including the information requested in [Section 2.3.1.4](#), must sign the Transmittal Letter. **In the Transmittal Letter, please indicate the principal contact for the proposal along with an address, telephone and fax number, and as an e-mail address, if that contact is different than the individual authorized for signature.**

### 2.2.4 RESPONDENT NOTIFICATION

Unless otherwise indicated in the Transmittal Letter, Respondents will be notified via e-mail.

It is the Respondent’s obligation to notify the Procurement Division of any changes in any address that may have occurred since the origination of this solicitation. The Procurement Division will not be held responsible for incorrect vendor/contractor addresses.

### 2.2.5 CONFIDENTIAL INFORMATION

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 *et seq.* (see [Section 1.17](#)).

If claiming exemption to the APRA, the Respondent must provide the following information:

- List all documents where claiming a statutory exemption to the APRA
- Specify which statutory exception of APRA that applies for each document
- Provide a description explaining the manner in which the statutory exception to the APRA applies for each document

## 2.2.6 OTHER INFORMATION

This item is optional. Any other information the Respondent may wish to briefly summarize will be acceptable.

## 2.3 BUSINESS PROPOSAL

The Business Proposal must address the following topics except those specifically identified as “optional.” The Business Proposal Template includes two (2) worksheets in Attachment E named Business Information and Contract Revisions.

### 2.3.1 BUSINESS INFORMATION

#### 2.3.1.1 GENERAL (OPTIONAL)

This section of the business proposal may be used to introduce or summarize any information the Respondent deems relevant or important to the State’s successful acquisition of the products and/or services requested in this RFS.

#### 2.3.1.2 RESPONDENT’S COMPANY STRUCTURE

The legal form of the Respondent’s business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization are to be included in this section. If the organization includes more than one (1) product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization.

#### 2.3.1.3 COMPANY FINANCIAL INFORMATION

This section must include the Respondent’s financial statement, including an income statement and balance sheet, for each of the two (2) most recently completed fiscal years. The financial statements must demonstrate the Respondent’s financial stability. If the financial statements being provided by the Respondent are those of a parent or holding company, additional financial information should be provided for the entity/organization directly responding to this RFS.

#### 2.3.1.4 INTEGRITY OF COMPANY STRUCTURE AND FINANCIAL REPORTING

This section must include a statement indicating that the CEO and/or CFO has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The particular areas of interest to the State in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

The Sarbanes Oxley Act of 2002, H.R. 3763, is NOT directly applicable to this procurement; however, its goals and objectives may be used as a guide in the determination of corporate responsibility for financial reports.

#### 2.3.1.5 CONTRACT TERMS/CLAUSES

A sample contract that the state expects to execute with the successful Respondent(s) is provided in Attachment B. This contract contains both mandatory and non-mandatory clauses. Mandatory clauses are listed in the following paragraphs and are non-negotiable. Other clauses are highly desirable. It is the State's expectation that the final contract will be substantially similar to the sample contract provided in Attachment B.

**In addition, vendors are required to adhere to the Data/Information Security Policy for Contractors presented in Attachment B1. This agreement will be incorporated into the final contract.**

In the Transmittal Letter please indicate acceptance of these mandatory contract terms (see [Section 2.2.2](#)). In this section please review the rest of the contract and indicate your acceptance of the non-mandatory contract clauses. If a non-mandatory clause is not acceptable as worded, suggest specific alternative wording to address issues raised by the specific clause. If additional contract terms are required, please include them in this section. To reiterate, it is the State's strong desire to not deviate from the contract provided in the attachment and as such the State reserves the right to reject any and all of these requested changes.

The mandatory contract terms are as follows:

- Duties of Contractor, Rate of Pay, and Term of Contract
- Authority to Bind Contractor
- Compliance with Laws
- Drug-Free Workplace Provision and Certification
- Employment Eligibility
- Funding Cancellation
- Governing Laws
- Indemnification
- Information Technology

- Non-Discrimination Clause
- Ownership of Documents and Materials
- Payments
- Penalties/Interest/Attorney's Fees
- Termination for Convenience
- Non-Collusion and Acceptance

Any or all portions of this RFS and any or all portions of the Respondent's response may be incorporated as part of the final contract

#### 2.3.1.6 REFERENCES

##### **System/Technical Architecture Design References**

The Respondent must include a list of at least three (3) clients/customers for whom the Respondent has provided system/technical architecture products and/or services that are the same or similar to those products and/or services requested in this RFS. **References for work performed by a Subcontractor may be used; however, at least one (1) reference must be for work performed by the prime vendor.** References should demonstrate experience within the last three (3) years for projects of similar size and scope preferably within state government, or within large complex business environments if state government experience is not available. Project experience within the last three (3) years should demonstrate:

- Knowledge and experience using **and implementing** Microsoft's technology infrastructure
- Knowledge and experience using iterative/incremental development methodologies
- Ability to determine, gather, and assess required information to define requirements

Preferably, experience will also demonstrate:

- Experience assessing and/or working with cloud based storage and solutions for a project of similar size and scope within the last three (3) years
- Experience with the Microsoft Azure Platform as a Services (PaaS) and Infrastructure as a Service (IaaS) **or an equivalent PaaS and IaaS**

At least one (1) reference should demonstrate the development of a system/technical architecture plan that was subsequently successfully implemented and is still in productive use within the last three (3) years.

##### **Business Process Redesign References**

The Respondent (prime vendor or subcontractor) must include a list of at least two (2) clients/customers for whom the Respondent has provided business process redesign services that are the same or similar to those products and/or services requested in this RFS. References should demonstrate experience within the last three (3) years for projects of

similar size and scope preferably within state government, or within large complex business environments if state government experience is not available. Preferably, experience should demonstrate motor vehicles business process redesign experience.

At least one (1) reference for the prime vendor or subcontractor should demonstrate recent successful completion of a Business Process Redesign (BPR) project of similar size and scope within the last three (3) years within a state government agency.

### **References Format**

All reference information provided should include the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information.

The Respondent must request their references complete and submit Attachment J - Customer Reference Form. References must submit completed forms in writing via email directly to IDOA ([rfp@idoa.in.gov](mailto:rfp@idoa.in.gov)) no later than the proposal due date and time, **February 14, 2017 at 3:00 p.m. EST**. References should include the following phrase in the email subject line: "Customer Reference to RFS 18-023 BMV/C STARS System Modernization." Confirmation will be provided to Respondents when references are received by IDOA.

Additionally, Respondents are required to **provide a history of all systems implementation projects in which your company was engaged, of similar size and scope as defined in Attachment F1 - Section Four Mandatory Requirements, in which the contract was terminated for any reason within the last three (3) years (February 2015 - February 2018). This must be submitted by the prime vendor only unless a subcontractor reference is utilized as defined in System/Technical Architecture Design References above. If a subcontractor reference is utilized, the subcontractor must provide a history of all recent systems implementation contract terminations as defined above.**

#### **2.3.1.7 REGISTRATION TO DO BUSINESS**

##### **Secretary of State**

If awarded the contract, the Respondent will be required to be registered, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations and limited liability companies. The Respondent must indicate the status of registration, if applicable, in this section of the proposal.

##### **Department of Administration, Procurement Division**

Additionally, Respondents must be registered with the IDOA. This can be accomplished on-line at <http://www.in.gov/idoa/2464.htm>.

The IDOA Procurement Division maintains two (2) databases of vendor information. The Bidder registration database is set up for vendors to register if you are interested in selling a product or service to the State of Indiana. Respondents may register on-line at no cost to

become a Bidder with the State of Indiana. To complete the on-line Bidder registration, go to <http://www.in.gov/idoa/2464.htm>. The Bidder registration offers email notification of upcoming solicitation opportunities, corresponding to the Bidder's area(s) of interest, selected during the registration process. Respondents do need to be registered to bid on and receive email notifications. Completion of the Bidder registration will result in your name being added to the Bidder's Database, for email notification. The Bidder registration requires some general business information, an indication of the types of goods and services you can offer the State of Indiana, and locations(s) within the State that you can supply or service. There is no fee to be placed in the Procurement Division's Bidder Database. To receive an award, you must be registered as a Bidder. Problems or questions concerning the registration process or the registration form can be e-mailed to Amey Redding, Vendor Registration Coordinator, [aredding@idoa.in.gov](mailto:aredding@idoa.in.gov), or you may reach her by phone at (317) 234-3542.

IVOSB entities (whether a prime or subcontractor) must have a Bidder ID. If registered with IDOA, this should have already been provided (as with MWBEs). IVOSBs that are only registered with the Federal Center for Veterans Business Enterprise will need to ensure that they also have a Bidder ID provided by IDOA.

#### 2.3.1.8 AUTHORIZING DOCUMENT

Respondent personnel signing the Transmittal Letter of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement.

#### 2.3.1.9 SUBCONTRACTORS

The Respondent is responsible for the performance of any obligations that may result from this RFS, and shall not be relieved by the non-performance of any subcontractor. Any Respondent's proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.

Any subcontracts entered into by the Respondent must be in compliance with all State statutes, and will be subject to the provisions thereof. For each portion of the proposed products or services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor's related qualifications and experience.

The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in the State's evaluation. The Respondent must furnish information to the State regarding the amount of the subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by the State. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate State officials, and such relationships must meet with the approval of the State.

The Respondent must list any subcontractor's name, address and the state in which formed that are proposed to be used in providing the required products or services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, the subcontractor's form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFS or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority, Women, or Veteran Owned Business under IC 4-13-16.5-1 and Executive Order 13-04 and IC 5-22-14-3.5. See Sections [1.23](#), [1.24](#), and Attachments A/A1 for Minority, Women, and Veteran Business information.

IVOSB entities (whether a prime or subcontractor) must have a Bidder ID. If registered with IDOA, this should have already been provided (as with MWBEs). IVOSBs that are only registered with the Federal Center for Veterans Business Enterprise will need to ensure that they also have a Bidder ID provided by IDOA (please see [Section 2.3.1.7](#), [Department of Administration, Procurement Division](#) for details).

#### 2.3.1.10 EVIDENCE OF FINANCIAL RESPONSIBILITY

This section will indicate the ability to provide the mandatory evidence of financial responsibility. See [Section 1.27](#) for details.

Notwithstanding any other provisions relating to the beginning of the term, any contract will not become effective until the evidence of financial responsibility is delivered in the correct form and amount to the address indicated in [Section 1.27](#).

#### 2.3.1.11 GENERAL INFORMATION

Each Respondent must enter their company's general information including contact information.

#### 2.3.1.12 EXPERIENCE SERVING STATE GOVERNMENTS

Each Respondent is asked to please provide a brief description of their company's experience in serving state governments and/or quasi-governmental accounts.

#### 2.3.1.13 EXPERIENCE SERVING SIMILAR CLIENTS

Each Respondent is asked to please describe their company's experience in serving clients of a similar size to the State that also had a similar scope. Please provide specific clients and detailed examples.

#### 2.3.1.14 INDIANA PREFERENCES

Pursuant to IC 5-22-15-7, a Respondent may claim only one (1) preference. For the purposes of this RFS, this limitation to claiming one (1) preference applies to Respondent's ability to claim eligibility for Buy Indiana points. **Respondent must clearly indicate which**



**preference(s) they intend to claim. Additionally, the Respondent's Buy Indiana status must be finalized when the RFS response is submitted to the State.**

## **Buy Indiana**

Refer to [Section 2.7](#) for additional information.

### 2.3.1.15 PAYMENT

Respondents should be able to accept payment by credit card as an optional form of payment, but should be able to accept other forms of payment from the State as well. In the Respondent's proposal, the Respondent should agree to accept any credit card-user handling fees associated with acceptance of the State's Purchasing Card. Please demonstrate how your company will meet this requirement of accepting payment by credit card as the only form of payment if the State chooses to implement this policy.

### 2.3.2 CONTRACT REVISIONS

The BMV/C intends to achieve a near final contract as part of the evaluation and selection process. The Sample Contract (Attachment B) provides proposed language for most aspects of the contract. **The Data/Information Security Policy for Contractors will also become part of the contract and is presented in Attachment B1.**

The Contract Revision worksheet in the Business Proposal Template (Attachment E) provides the structure for qualified Respondents to recommend contract language changes. The State reserves the right to reject any of these requested changes. It is the State's expectation that all material elements of the contract will be substantially finalized prior to contract award.

## 2.4 TECHNICAL PROPOSAL

**Explanation of the** Mandatory Requirements, Technical Proposal Requirements, and Key Performance Measures are presented in Attachment F1. Respondents must respond to each individual requirement using the Technical Proposal response template presented in Attachment F2.

The Mandatory Requirements are presented in a separate worksheet in Attachment F2 named Mandatory Req Response. This worksheet lists the requirements that must be met in order for the Respondent to be considered qualified. These requirements will be graded on a pass/fail scale as described in [Section 3.1](#) and [Section 3.2](#). For each Mandatory Requirement, Respondents should respond with a Yes/No answer. In addition, in no more than 300 words, Respondents should provide an explanation including the evidence and references supporting their response. When Respondents provide supporting evidence, they should clearly identify the location of the additional documentation to support their explanations.

The Technical Response Requirements are presented in a separate worksheet in Attachment F2 named Technical Req Response. For each Technical Response Requirement, Respondents should indicate whether or not the Respondent agrees to the Vendor Responsibility. Respondents should enter comments as necessary to provide additional information.

The Key Performance Measures are presented in a separate worksheet in Attachment F2 named KPM response. For each Key Performance Measure, Respondents should indicate whether or not the Respondent agrees to the Vendor Responsibility. Respondents should enter comments as necessary to provide additional information.

Refer to the instructions worksheet in Attachment F2 for detailed instructions for completing the entire Technical Proposal workbook.

In addition, each Respondent should also prepare a Technical Proposal response narrative per RFS section as defined in the table below, addressing the following Proposal Submission Requirements. Narrative responses must be structured and numbered according to the RFS section numbers and headers as presented in the table below. Responses in each section must be addressed in the order given. RFS language should not be repeated within the response.

Where appropriate, supporting documentation may be referenced by a page and paragraph number. However, when this is done, the body of the technical proposal must contain a meaningful summary of the referenced material. The referenced document must be included as an appendix to the technical proposal with referenced sections clearly marked. If there are multiple references or multiple documents, these must be listed and organized for ease of use by the State.

When requested, the Respondent should present Work Samples in a Separate section (Section 6) of the Response. **The Respondent may identify Work Samples as confidential, according to the guidelines presented in Section 1.17 Confidential Information, in this RFS.**

RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
5.1.1.3	Project Management	<p>Respondents <b>must</b> describe their overall approach to all aspects of project management with an emphasis on time management, human resource management, communication management, and risk and issue management.</p> <p>Note refer to Section 6.1 of this proposal response table for work sample submission requirements</p>	10 pages
5.1.1.4	Time Management	<p>Respondents must provide a high-level description their approach to developing the project schedule to complete the deliverables in this RFS.</p> <p>The Respondents must describe their approach to measuring and monitoring project progress. Respondents should describe any performance</p>	5 pages

RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
		indexes they use to monitor the project schedule.	
5.1.1.4.1	Project Schedule	Response must provide a detailed project schedule (work plan) with a detailed Work Breakdown Structure (WBS) of all tasks, subtasks, and activities required to complete all sections of this RFS. This WBS should contain at least three (3) levels of detail	No limit
5.1.1.5	Human Resource Management	Respondents <b>must</b> describe their proposed project organization and staffing in detail.	5 pages
5.1.1.5.1	Organization Chart	Respondents <b>must</b> provide an organization chart with <b>resource names</b> and job titles, <b>including subcontractors</b> .	5 pages
5.1.1.5.2	Roles and Responsibilities	Respondents <b>must</b> provide a summary of responsibilities for each proposed each resource role	5 pages
5.1.1.5.3	On-site Resources	Respondents <b>must</b> provide an estimate of the number of staff who will be on-site at the BMV/C for the duration of the engagement.	2 pages
5.1.1.5.4	Resumes	Respondents <b>must</b> provide resumes for, at a minimum, the key staff positions. Resumes <b>must</b> include detailed employment history including projects, employer, and dates of employment. Include PMI certification and certification number, as applicable  Resumes for other positions are desirable and their submission is encouraged. Resumes <b>must</b> include detailed employment history including projects, employer and dates of employment. Sample resumes for positions which are anticipated to have multiple occupants are acceptable. Include PMI certification and certification number, as applicable	No Limit
5.1.1.5.5	Project Resource Staffing Plan	Respondents <b>must</b> describe the intended content of their project resource staffing plan and describe their process for administering and maintaining this plan.	10 pages

RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
5.1.1.6	Communication Management	<p>Respondents must describe their approach and methodology to develop and maintain their Communication Management Plan.</p> <p>Respondents must describe their approach to communicating project progress on project deliverables and all applicable PMBOK areas.</p>	10 pages
5.1.1.10	Cost Management	<p>The Respondents must describe their approach to managing and monitoring project costs.</p> <p>Respondents should describe any performance indexes they use to monitor the project budget.</p>	5 pages
5.1.1.11	Quality Management	<p>Respondents must describe their approach and methodology to meet requirements 102400 - 102700</p>	10 pages
5.2	Privacy Standards	<p>Respondents <b>must</b> provide a description of their understanding and approach to achieving and maintaining compliance with privacy standards. Provide an explanation and example of current privacy training the <b>Respondent</b> uses to educate staff and subcontractors.</p>	10 pages
5.3	Security	<p>Respondents <b>must</b> provide a description of their understanding and approach to achieving and maintaining compliance with security standards. Provide an explanation and example of current security training the <b>Respondent</b> uses to educate staff and subcontractors.</p>	10 pages
5.4	Documentation	<p>Respondents <b>must</b> provide a description of their approach to meeting the documentation requirements as they relate to planning, developing, and managing documentation throughout the entire project.</p>	10 pages
5.5	Business Process Analysis and Redesign	<p>Respondents <b>must</b> provide a complete description of their approach and methodology for completing each deliverable in the business process analysis and redesign presented in Attachment F1.</p> <p>Organize your response for each deliverable, as follows:</p> <p><b>5.5.1.1 Approved Transaction/Process List</b></p>	25 pages

RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
		<p>(Deliverable: An approved list of all transactions and processes included in the scope of this activity)</p> <p><b>5.5.1.2 As-Is Business Process Maps</b>  (Deliverable: As-is business process maps for all transactions and processes defined in the scope document defined above. Business Process maps will be documented in Business Process Modeling Notation (BPMN) using MS Office Visio 2016.)</p> <p><b>5.5.1.3 As-Is Map Inventory</b>  (Deliverable: Inventory list of all as-is business process maps with corresponding transaction volumes for each map)</p> <p><b>5.5.2.1 Business Process Recommendations</b>  (Deliverable: Business Process Improvement and Redesign Recommendations and Finding Report)</p> <p><b>5.5.2.2 To-Be Business Process Maps</b>  (Deliverable: To-be business process maps for all approved recommendations)</p> <p>The description <b>must</b> describe, in detail, how the Respondent will schedule and organize the business process analysis data gathering and mapping activities and the information or resource needs the Respondent requires to successfully complete the business process analysis and redesign.</p> <p>A detailed set of activities <b>must</b> be defined and included in the project schedule (work plan) required in Section 5.1.1.4.1 of this response.</p> <p>Note: refer to Section 6.2 of this proposal response table for work sample submission requirements</p>	

RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
5.6.1	STARS System Architecture Gap Analysis	<p>Respondents <b>must</b> provide a complete description of their approach and methodology for completing the Gap Analysis.</p> <p>The description <b>must</b> describe how the Respondent will complete the analysis for each component of the Gap Analysis in the order it is presented in the bulleted list in Section 5.5.1 of Attachment F1.</p> <p>The explanations <b>must</b> also describe the Respondent’s plan for completing the Gap Analysis in coordination with the activities and output from the business process analysis activities.</p> <p>The Respondent <b>must</b> address the information or resource needs the Respondent requires to successfully complete each component of the Gap Analysis.</p> <p>Organize your response for each deliverable, as follows:</p> <p><b>5.6.1.1 STARS configuration (hardware, software, work stations)</b></p> <p><b>5.6.1.2 Mechanisms, internal or external to the BMV/C, for system-to-system communication</b></p> <p><b>5.6.1.3 Data standards</b></p> <p><b>5.6.1.4 Security and privacy mechanisms and standards</b></p> <p><b>5.6.1.5 Standards, policies, and procedures governing STARS/Galaxy throughout the entire System Development Life Cycle (SDLC) to include:</b></p> <ul style="list-style-type: none"> <li>▪ Configuration management</li> </ul>	30 pages

RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
		<ul style="list-style-type: none"> <li>▪ Environments (Development, UAT, Staging, Training, Production)</li> <li>▪ Testing</li> <li>▪ Training</li> <li>▪ Code promotion</li> <li>▪ Release management and maintenance</li> </ul> <p><b>5.6.1.6 Technical components to support the entire SDLC including:</b></p> <ul style="list-style-type: none"> <li>▪ Security</li> <li>▪ System administration</li> <li>▪ Configuration management</li> <li>▪ Environments (Development, UAT, Staging, Training, Production)</li> <li>▪ Testing</li> <li>▪ Training</li> <li>▪ Code promotion</li> <li>▪ Release management and maintenance</li> </ul> <p><b>5.6.1.7 Technology stack and network infrastructure</b></p> <p><b>5.6.1.8 BMV/C staff levels and skills</b></p> <p>Note: refer to Section 6.3 of this proposal response table for work sample submission requirements</p>	
5.6.2	STARS System Architecture and Technical Modernization Design Plan	<p>Respondents <b>must</b> provide a complete description of their approach and methodology for completing the Design Plan <b>including the proposed approach to the Cost Benefit Analysis.</b></p> <p>The description <b>must</b> address how the Respondent will complete the analysis for each component of the Design Plan in the order it is presented in the bulleted list in Section 5.6.2 of Attachment F1.</p> <p>The explanations <b>must</b> also describe the Respondent’s plan for completing the Design Plan in coordination with the activities and</p>	30 pages

RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
		<p>output from the business process analysis activities.</p> <p>The Respondent <b>must</b> address the information or resource needs the Respondent requires to successfully complete each component of the Design Plan.</p> <p>Organize your response for each deliverable, as follows:</p> <p><b>5.6.2.1 STARS configuration (hardware, software, work stations)</b></p> <p><b>5.6.2.2 Mechanisms, internal or external to the BMV/C, for system-to-system communication</b></p> <p><b>5.6.2.3 Data standards</b></p> <p><b>5.6.2.4 Security and privacy mechanisms and standards</b></p> <p><b>5.6.2.5 Standards, policies, and procedures governing STARS/Galaxy throughout the entire System Development Life Cycle (SDLC) to include:</b></p> <ul style="list-style-type: none"> <li>▪ Configuration management</li> <li>▪ Environments (Development, UAT, Staging, Training, Production)</li> <li>▪ Testing</li> <li>▪ Training</li> <li>▪ Code promotion</li> <li>▪ Release management and maintenance</li> </ul> <p><b>5.6.2.6 Technical components to support the entire SDLC including:</b></p> <ul style="list-style-type: none"> <li>▪ Security</li> <li>▪ System administration</li> <li>▪ Configuration management</li> <li>▪ Environments (Development, UAT, Staging, Training, Production)</li> </ul>	



RFS and Proposal Response Section Number	RFS and Proposal Response Section Header	Proposal Response Requirements	Page Limit
		<ul style="list-style-type: none"> <li>▪ Testing</li> <li>▪ Training</li> <li>▪ Code promotion</li> <li>▪ Release management and maintenance</li> </ul> <p><b>5.6.2.7 Technology stack and network infrastructure</b></p> <p><b>5.6.2.8 Evaluation of existing staff levels and skills, number and type of staff, and knowledge and skill required for staff based on the maintenance and operations needs of the future system architecture</b></p> <p>Note: refer to Section 6.4 of this proposal response table for work sample submission requirements</p>	
6.1	Work Samples – Project Management	<p>Respondents must provide the following project management documents from a project of similar scope:</p> <ul style="list-style-type: none"> <li>▪ Communication management plan</li> <li>▪ Risk management plan</li> </ul>	No Limit
6.2	Work Samples – Business Process Maps	<p>Respondents must provide a copy of completed, approved business process maps from a project of similar scope using Business Process Modeling Notation (BPMN). Preferably, the business process maps will be from work completed for a reference of the Respondent.</p>	No Limit
6.3	Work Samples – Technical Gap Analysis	<p>Respondents must provide a copy of a completed Gap Analysis from a project of similar scope. Preferably, the Gap Analysis will be from work completed for a reference of the Respondent.</p>	No Limit
6.4	Work Samples – Technical Design Plan	<p>Respondents must provide a copy of a completed Technical Design Plan from a project of similar scope. Preferably, the Design Plan will be from work completed for a reference of the Respondent.</p>	No Limit

## 2.5 COST PROPOSAL

The Cost Proposal Template is Attachment D and includes three (3) worksheets named Cost Assumptions, Payment Schedule, and Hourly Rates.

The Cost Proposal must be submitted in the original format. Any attempt to manipulate the format of the Cost Proposal document, attach caveats to pricing, or submit pricing that deviates from the current format will put your proposal at risk.

The Respondent should list any cost assumptions, conditions, and/or constraints relative to, or which impact, the payment schedule prices in a separate worksheet in Attachment D, named Cost Assumptions.

The deliverable based payment schedule for the Phase 1 deliverables are to be completed in a separate worksheet in Attachment D, named Payment Schedule.

The Respondent should provide a list of all anticipated resource roles necessary to complete Phases 1, 2, and 3 with the corresponding hourly rates for each role in a separate worksheet in Attachment D, named Hourly Rates. The rates provided for Phase 1 roles will be used for scoring purposes. Although the scope of this RFS is limited to Phase 1, the rates presented in the Hourly Rates worksheet for Phases 2 and 3 will become part of the contract.

## 2.6 INDIANA ECONOMIC IMPACT

All companies desiring to do business with state agencies must complete an “Indiana Economic Impact” form (Attachment C). The collection and recognition of the information collected with the Indiana Economic Impact form places a strong emphasis on the economic impact a project will have on Indiana and its residents regardless of where a business is located. The collection of this information does not restrict any company or firm from doing business with the State. The amount entered in Line 16 “Total amount of this proposal, bid, or current contract” should match the amount entered in the Attachment D, Cost Proposal Template.

## 2.7 BUY INDIANA INITIATIVE/INDIANA COMPANY

It is the Respondent’s responsibility to confirm its Buy Indiana status for this portion of the process. If a Respondent has previously registered its business with IDOA, go to <http://www.in.gov/idoa/2464.htm> and click on the link to update this registration. Click the tab titled Buy Indiana. Select the appropriate category for your business. Respondents may only select one (1) category. Certify this selection by clicking the check box next to the certification paragraph. Once this is complete, save your selection and exit your account.

Respondents that have not previously registered with IDOA must go to <http://www.in.gov/idoa/2464.htm> and click on the link to register. During the registration process, follow the steps outlined in the paragraph above to certify your business’ status. The registration process should be complete at the time of proposal submission.

Respondents must clearly indicate which preference(s) they intend to claim in the Business Proposal, Attachment E, [Section 2.3.1.14](#) (Respondent will only be evaluated on the criteria selected/cited from IC 5-22-15-20.5).

Additionally, Respondents that wish to claim the Buy Indiana preference (for any criteria listed below) must have an email confirmation of their Buy Indiana status provided by [buyindianainvest@idoa.in.gov](mailto:buyindianainvest@idoa.in.gov) included in the proposal response. The email confirmation must have been provided from within one (1) year prior to the proposal due date.

Respondents must also fully complete the Indiana Economic Impact form (Attachment C) and include it with their proposal response.

Defining an Indiana Business:

“Indiana business” refers to any of the following:

- A business whose principal place of business is located in Indiana
- A business that pays a majority of its payroll (in dollar volume) to residents of Indiana
- A business that employs Indiana residents as a majority of its employees
- A business that makes significant capital investments in Indiana
- A business that has a substantial positive economic impact on Indiana

Substantial Capital Investment:

Any company that can demonstrate a minimum capital investment in Indiana of \$5 million or more in plant and/or equipment or annual lease payments in Indiana of \$2.5 million or more shall qualify as an Indiana business under I.C.5-22-15-20.5 (b)(4).

Substantial Indiana Economic Impact:

Any company that is in the top 500 companies (adjusted) for one (1) of the following categories shall qualify as an Indiana business under I.C. 5-22-15-20.5 (b)(5).

- Number of employees (DWD)
- Unemployment taxes (DWD)
- Payroll withholding taxes (DOR)
- Corporate Income Taxes (DOR)

## **SECTION THREE PROPOSAL EVALUATION**

### **3.1 PROPOSAL EVALUATION PROCEDURE**

The State has selected a group of personnel to act as a proposal evaluation team. Subgroups of this team, consisting of one (1) or more team members, will be responsible for evaluating proposals with regards to compliance with RFS requirements. All evaluation personnel will use the evaluation criteria stated in [Section 3.2](#). The Commissioner of IDOA or their designee will, in the exercise of their sole discretion, determine which proposals offer the best means of servicing the interests of the State. The exercise of this discretion will be final.

The procedure for evaluating the proposals against the evaluation criteria will be as follows:

1. Each proposal will be evaluated for adherence to requirements on a pass/fail basis. Proposals that are incomplete or otherwise do not conform to proposal submission requirements may be eliminated from consideration
2. Each proposal will be evaluated on the basis of the categories included in [Section 3.2](#). A point score has been established for each category
3. If technical proposals are close to equal, greater weight may be given to price
4. Based on the results of this evaluation, the qualifying proposal determined to be the most advantageous to the State, taking into account all of the evaluation factors, may be selected by IDOA and the BMV/C for further action, such as final contract negotiations. If IDOA and the BMV/C decide that no proposal is sufficiently advantageous to the State, the State may take whatever further action is deemed necessary to fulfill its needs. If, for any reason, a proposal is selected and it is not possible to consummate a contract with the Respondent, IDOA may begin contract preparation with the next qualified Respondent or determine that no such alternate proposal exists

### **3.2 EVALUATION CRITERIA**

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the RFS in a cost-effective manner. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category. The points associated with each category are indicated following the category name (total maximum points = 103). If any of the listed criteria on which the responses to this RFS will be evaluated are found to be inconsistent or incompatible with applicable Federal laws, regulations, or policies, the specific criterion or criteria will be disregarded and the responses will be evaluated and scored without taking into account such criterion or criteria.

Summary of Evaluation Criteria:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business Proposal, Technical Proposal, Implementation Proposal, Oral Presentations and Demonstrations, Contract Negotiations)	50 available points
3. Cost (Cost Proposal)	25 available points
4. Indiana Economic Impact	5
5. Buy Indiana	5
6. Minority Business Enterprise Subcontractor Commitment	5 (1 bonus point is available, see <a href="#">Section 3.2.6</a> )
7. Women Business Enterprise Subcontractor Commitment	5 (1 bonus point is available, see <a href="#">Section 3.2.6</a> )
8. Indiana Veteran Business Enterprise (IVOSB) Subcontractor Commitment	5 (1 bonus point is available, see <a href="#">Section 3.2.7</a> )
Total	100 (103 if bonus awarded)

All proposals will be evaluated using the following approach.

Step 1:

In this step proposals will be evaluated only against Criteria 1 to ensure that they adhere to Mandatory Requirements. Any proposals not meeting the Mandatory Requirements will be disqualified.

Step 2:

The proposals that meet the Mandatory Requirements will then be scored based on Criteria 2 and 3 ONLY. This scoring will have a maximum possible score of 75 points. All proposals will be ranked on the basis of their combined scores for Criteria 2 and 3 ONLY. This ranking will be used to create a “short list”. Any proposal not making the “short list” will not be considered for any further evaluation.

Step 2 may include one (1) or more rounds of proposal discussions, oral presentations, clarifications, demonstrations, etc. focused on cost and other proposal elements. Step 2 may include a second “short list”.

Step 3:

The short-listed proposals will then be evaluated based on all the entire evaluation criteria outlined in the table above.

If the State conducts additional rounds of discussions and a BAFO round, which leads to changes in either the technical or cost proposal for the short-listed Respondents, their scores will be recomputed.

The section below describes the different evaluation criteria.

### 3.2.1 ADHERENCE TO REQUIREMENTS - PASS/FAIL

Respondents passing this category move to Phase 2 and their proposal is evaluated for Management Assessment/Quality and Price.

The following 2 categories cannot exceed 75 points.

### 3.2.2 MANAGEMENT ASSESSMENT/QUALITY

**50** available points

### 3.2.3 PRICE

**25** available points

Cost scores will then be normalized to each other, based on the lowest cost proposal evaluated. The lowest cost proposal receives a total of 25 points. The normalization formula is as follows:

- Respondent's Cost Score = (Lowest Cost Proposal / Total Cost of Proposal) X 25

### 3.2.4 INDIANA ECONOMIC IMPACT (5 POINTS)

See [Section 2.6](#) for additional information.

The total number of full time equivalent (FTE - please see [Section 1.2](#) for a definition of FTE's) Indiana resident employees for the Respondent's proposal, to execute the scope of work proposed in this RFS, (prime contractor and subcontractors) will be used to evaluate the Respondent's Indiana Economic Impact. Points will be awarded based on a graduated scale. The Respondent with the most Indiana FTEs will be awarded 5 points. Points will then be awarded to the remaining Respondents proportionately. Please see Attachment C, Indiana Economic Impact Form, for more detailed instructions.

### 3.2.5 BUY INDIANA INITIATIVE (5 POINTS)

Respondents qualifying as an Indiana Company as defined in [Section 2.7](#) will receive 5 points in this category.

3.2.6 MINORITY (5 POINTS) AND WOMEN'S BUSINESS (5 POINTS)  
SUBCONTRACTOR COMMITMENT (10 POINTS)

The following formula will be used to determine points to be awarded based on the MBE and WBE goals listed in [Section 1.22](#) of this RFS. Scoring is conducted based on an assigned 10-point, plus possible 2 bonus-points, scale (MBE: Possible 5 points + 1 bonus point, WBE: Possible 5 points + 1 bonus point). Points are assigned for respective MBE participation and WBE participation based upon the BAFO meeting or exceeding the established goals.

If the Respondent's commitment percentage is less than the established MBE or WBE goal, the maximum points achieved will be awarded according to 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

NOTE: Fractional percentages will be rounded up or down to the nearest whole percentage. (e.g. 7.49% will be rounded down to 7% = 4.375 pts., 7.50% will be rounded up to 8% = 5.00 pts.)

If the Respondent's commitment percentage is rounded down to 0% for MBE or WBE participation the Respondent will receive 0 points.

If the Respondent's commitment percentage is 0% for MBE or WBE participation, a deduction of 1 point will be discounted on the respective MBE or WBE score.

The Respondent with the greatest applicable CUF participation which exceeds the stated goal for the respective MBE or WBE category will be awarded 6 points (5 points + 1 bonus point). In cases where there is a tie for the greatest applicable CUF participation and both firms exceed the goal for the respective MBE/WBE category both firms will receive 6 points.

3.2.7 INDIANA VETERAN OWNED SMALL BUSINESS SUBCONTRACTOR  
COMMITMENT (5 POINTS)

The following formula will be used to determine points to be awarded based on the IVOSB goal listed in [Section 1.22](#) of this RFS. Scoring is conducted based on an assigned 5-point, plus possible 1 bonus-point, scale. Points are assigned for IVOSB participation based upon the BAFO meeting or exceeding the established goals.

If the Respondent's commitment percentage is less than the established IVOSB goal, the maximum points achieved will be awarded according to the following schedule:

%	0.6%	1.2%	1.8%	2.4%	3%
Pts.	1	2	3	4	5

NOTE: Fractional points will be awarded based upon a graduated scale between whole points. (e.g. a 0.3% commitment will receive .5 points and a 1.5% commitment will receive 2.5 points)

If the Respondent's commitment percentage is 0% for IVOSB participation, a deduction of 1 point will be assessed.

The Respondent with the greatest applicable CUF participation which exceeds the stated goal for the IVOSB category will be awarded 6 points (5 points + 1 bonus point). In cases where there is a tie for the greatest applicable CUF participation and both firms exceed the goal for the IVOSB category both firms will receive 6 points.

### 3.2.8 QUALIFIED STATE AGENCY PREFERENCE SCORING

When applicable, pursuant to Indiana Code 5-22-13, a qualified state agency submitting a response to this RFS will be awarded preference points for Minority, Women's, and Indiana Veteran Business Enterprise equal to the Respondent awarded the highest combined points awarded for such preferences in the scoring of this RFS.

The Commissioner of IDOA or their designee will, in the exercise of their sole discretion, determine which proposal(s) offer the best means of servicing the interests of the State. The exercise of this discretion will be final.