**A close up of a logo

Description generated with very high confidence**

**Knowledge Services MSP**

**Request for Project Services**

**Project Name:**

**Date:**

**Timeline / Important Dates**

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Issue of SOW/Project Request for Services |  |
| Deadline for Vendors to Submit Written Questions to [MSP\_SOINProjects@knowledgeservices.com](mailto:MSP_SOINProjects@knowledgeservices.com) by 2:00pm EST |  |
| Agency Answers to Written Questions |  |
| Proposals Due in dotStaff™ by 2:00pm EST |  |
| Evaluation of Proposals |  |
| Best and Final Offers |  |
| Services Awarded |  |
| Services Start | Upon fully-executed work order and issuance of purchase order |

*The above timeline is only an illustration of the SOW/Project RFS process. The dates associated with each step are not to be considered binding. Due to the unpredictable nature of the SOW/Project RFS process in general, these dates are commonly subject to change. At the conclusion of the evaluation process, all Respondents will be informed of the evaluation team’s findings.*

# Project Background

**PROJECT OVERVIEW**

1. Project Identification
   1. Project Purpose and Objective
   2. Background
2. Acronyms/Definitions
3. Scope of Work & Deliverables
   1. Services Required
   2. Deliverables
   3. In Scope
   4. Out of Scope
   5. Environment
4. Pricing Model
   1. Milestone/Deliverable: To be utilized when invoicing/payment will be submitted after approval of milestones and/or deliverables. Project Manager and/or Project Sponsor to indicate Milestones/Deliverables for which they are looking to be submitted.
   2. Fixed-bid: To be utilized when invoicing/payment will be submitted when the project is completed.
   3. Time and Material: To be utilized when invoicing/payment will be submitted monthly, based upon hours worked.

## **Examples of Pricing Models**

## **Milestone/Deliverable Pricing Model**

|  |  |
| --- | --- |
| **Milestone/Deliverable** | **Cost** |
| Milestone/Deliverable 1: | $ |
| Milestone/Deliverable 2: | $ |
| Milestone/Deliverable 3: | $ |
| Milestone/Deliverable 4: | $ |
| Milestone/Deliverable 5: | $ |
| Total Project Costs: | $ |

**\* Note:** *Total Project Costs are not to exceed amount submitted/proposed.* *Price must be* ***ALL INCLUSIVE****, including, but not limited to, any and all delivery costs or destination fees.*

## **Fixed Bid Pricing Model**

|  |  |
| --- | --- |
| **Project Costs:** | **$** |
| Total Project Fixed Costs\*: | $ |

**\* Note:** *Total Project Costs are not to exceed amount submitted/proposed.* *Price must be* ***ALL INCLUSIVE****, including, but not limited to, any and all delivery costs or destination fees.*

## **Hourly Billing Pricing Model**

|  |  |  |  |
| --- | --- | --- | --- |
| **Resource’s Role / Job Title** | **Hourly Bill Rate** | **Project Hours** | **Total Costs** |
| Role 1: | $ |  | $ |
| Role 2: | $ |  | $ |
| Role 3: | $ |  | $ |
| Role 4: | $ |  | $ |
| Role 5: | $ |  | $ |
| Total Project Costs: |  |  | $ |

**\* Note:** *Total Project Costs are not to exceed amount submitted/proposed.* *Price must be* ***ALL INCLUSIVE****, including, but not limited to, any and all delivery costs or destination fees.*

# Evaluation Process and Criteria

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the Request for Project Services in a cost-effective manner.

**Summary of Evaluation Criteria:**

|  |  |
| --- | --- |
| **Criteria** | **Points** |
| 1. Adherence to Mandatory Requirements | Pass/Fail |
| 2. Management Assessment/Quality (MAQ) | 60 available points |
| 3. Cost (Cost Proposal) | 35 available points |
| 4. Buy Indiana | 5 available points |
| Total | **100 available points** |

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 95 points. All proposals will be ranked based on their combined scores for Criteria 2 and 3 ONLY. This ranking may be used to create a “short list”. Any proposal not making a “short list” will not be considered for any further evaluation.

*Note*: Step 2 may include one 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

If the State conducts additional rounds of discussions and a best and final offer (BAFO) round which lead to changes in either the MAQ or Cost sections for the listed Respondents, their scores will be recomputed.

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

Step 4

The response receiving the highest combined Total score, as outlined in the table above, will receive the award.

The below describes the different evaluation criteria.

**Adherence to Requirements [Pass/Fail]**

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

**Management Assessment/Quality [60 available points]**

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of this Project RFS.

**Cost [35 available points]**

Cost scores will be normalized to one another, based on the lowest cost proposal evaluated. The lowest cost proposal receives a total of 35 points. The normalization formula is as follows:

*Respondent’s Cost Score = (Lowest Cost Proposal / Total Cost of Proposal) X 35*

**Buy Indiana [5 available points]**

Respondents qualifying as an Indiana Company will receive 5 points in this category.

Respondent must clearly indicate which preference(s) they intend to claim in the Supplier Response section, contained within Company Information (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 year prior to the proposal due date.*

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 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.

Defining an Indiana Business:

“Indiana business” refers to any of the following:

1. A business whose principal place of business is located in Indiana.
2. A business that pays a majority of its payroll (in dollar volume) to residents of Indiana.
3. A business that employs Indiana residents as a majority of its employees.
4. A business that makes significant capital investments in Indiana.
5. 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 of the following categories: number of employees (DWD), unemployment taxes (DWD), payroll withholding taxes (DOR), or Corporate Income Taxes (DOR); it shall qualify as an Indiana business under I.C. 5-22-15-20.5 (b)(5).

# Supplier Response

All items listed below are mandatory. If they are not included, the proposal may be failed and not further considered.

Proposals must be submitted as a single document of PDF. When claiming confidential information, if applicable, the State should receive two PDF documents. See the following section for further detail.

**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 award, the entire Request for Projects Services 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 on a separate attachment labeled “**Confidential Documentation Listing**”. That document should include 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.

When claiming confidential information, respondents should submit two versions of their response: 1) a confidential version (for the State’s review and evaluation) and 2) a redacted version (for public records requests).

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 one of the disclosure exceptions to APRA, it may seek the opinion of the Public Access Counselor.

Prices are NOT confidential information.

**The response should be in the following order:**

**COMPANY INFORMATION**

1. Provide legal name of your company, street address, legal incorporation status, name of subsidiaries, company size and parent company.
2. Indicate your claim to the Buy Indiana preference and provide, if applicable, the email confirmation of a Buy Indiana status provided by [buyindianainvest@idoa.in.gov](mailto:buyindianainvest@idoa.in.gov) included in the proposal response.

**GENERAL COMPANY PROFILE**

1. Describe your competitive advantage (what sets you apart or your company strength)
2. Describe your experience related to the type of project and/or services being requested.

**EXECUTIVE SUMMARY (Please limit to two pages)**

**REFERENCES**

1. Must provide three References for which your company provided a similar project and/or services being requested.

**RESPONSE AREA**

1. Solution Proposal, inclusive of everything required from Project Overview – Statement of Work Template
   1. Description of deliverables to be provided by Supplier
2. Subcontracting Information (if applicable)
3. Roles & Responsibilities
   1. Contractor Staff, Roles & Responsibilities
   2. Client Staff, Roles & Responsibilities
   3. Other Roles & Responsibilities
   4. Resumes of Key Personnel assigned to Project
4. Project Planning and Approach
   1. Describe your overall project approach and project management methodology to be used for this project.
   2. Provide an example of a project schedule that you would use on this project and include approach to managing the schedule and communicating task performance.
   3. Provide a list of technologies that will be used to satisfy State of Indiana requirements.
   4. Provide an overview of your security approach, including your company’s secure coding practices and principles and how your company tests to confirm both the application code and data are secure.
   5. Testing – Describe the testing appropriate including the level of testing that you will do to ensure the State of Indiana receives a version of the code that is of the highest quality.
   6. Defect Management Approach – Describe the approach you take to capture, process, correct, and release defects found during State of Indiana testing.
   7. Data Conversion Approach – If required, describe how data conversion will be planned and managed.
   8. Training Approach – What types of training will be created for this project and how will it be delivered.
   9. Post Go-Live Support Approach – What level of support and for what duration can be expected after the new system go-live.
5. Project Management – Provide an overview of the following activities to be performed during the project:
   1. Risk / Issue Management and Escalation as needed. Also provide some key risks that you find common for projects with similar scope and goals and include the associated mitigation strategies you’ve used for those risks.
   2. Change Management – Describe how changes will be captured, cost/effort estimated, and approved changes added to the project.
   3. Status Updates. Include a description what meetings the State of Indiana can expect and an example of a status report.
6. Pricing Summary

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