

<p><b>REQUEST FOR QUOTE (RFQ)</b></p>
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**RFP NUMBER: EDUD201230600**

**DATE ISSUED: MAY 4, 2012**

**ELIGIBILITY: Open to Vendors with Ohio State Term Schedule**

**The State of Ohio Department of Education is requesting Price Quotes for:**

**TITLE:** Race To The Identity Management And Web Portal Implementation

**INQUIRY PERIOD BEGINS: May 4, 2012**

**INQUIRY PERIOD ENDS: May 18, 2012**

**PRICE QUOTE DUE DATE: June 1, 2012 Time: 5:00 PM**

**QUOTE OPENING DATE: June 8, 2012**

**ESTIMATED AWARD DATE: June 22, 2012**

## PROJECT INFORMATION

### PROJECT REQUEST

This Request of Quote (RFQ) identifies work to be performed under the anticipated contract. Services will be rendered, and deliverable items completed within the 2013 fiscal year, beginning July 1, 2012 and ending June 30, 2013. The work will take place starting on or after July 1, 2012 and ending by or before June 30, 2013. The work associated with this RFQ comprises the Implementation Phase of Ohio's Race to the Top Data Tools and Web Portals projects.

The vendor will be responsible for implementation of a solution meeting the documented requirements for each of the following:

- A public facing Ohio Department of Education (ODE) Data Tools Web Portal which will be a component of the existing Ohio Department of Education's website
- A secure, role based, user configurable "My Data Tools Page"
- An Identity Management solution enabling Administrator and Educator access to secure ODE Data Tools, and the My Data Tools page

The vendor will be responsible for proposing and implementing a Data Tools Web Portal and My Data Tools Page solution which utilizes either SharePoint 2010, .Net 4.0 or a combination of the two technologies. Project staffing requirements will vary based on the proposed technology stack; it is the vendor's responsibility to provide a project staff which enables the implementation of their proposed solution.

**The vendor should have demonstrated extensive experience in implementation of web portals, both public facing and secured; enterprise identity management solutions; performance testing and tuning; user acceptance testing; creation of detailed end user documentation; training; deployment planning; and launch support for engagements of similar size and scope.**

The contents of this Request for Quote were developed under a grant from the U.S. Department of Education. However, the contents do not necessarily represent the policy of the U.S. Department of Education, and you should not assume endorsement by the Federal Government.

The vendor shall adhere to all USDOE federal reporting requirements (e.g. 1512 ARRA quarterly reporting to ODE).

The vendor agrees to provide the bulk of the following services at the primary site of Ohio Department of Education 25 South Front St, Columbus, OH 43215; and State Data applicable to this contract will be maintained or made available at 25 South Front St, Columbus, OH 43215. The vendor may be required to travel to stakeholder locations around Ohio for detailed requirements gathering and analysis as needed.

During the performance of this contract, the vendor shall not change the location(s) of the country where services are performed, or change the location(s) of the country where the data are maintained or made available without prior written approval of the Department, if applicable.

The work will be deemed successful if the deliverables defined herein are completed and if these deliverables are available to fulfill their intended purposes.

Prospective vendors will/may be interviewed prior to contract award to ensure knowledge and capacity to meet the project requirements.

This project is classified as a competitive fixed bid proposal. As part of the response, please include a recommended payment schedule.

Contingent upon continued funding and approval by the State, this contract may be renewed in Fiscal Year 2014, beginning July 1, 2013 and ending June 30, 2014, under the same terms and conditions if necessary.

### Project Background

In 2010, Ohio was one of twenty states awarded a Race to the Top grant. Ohio's grant application includes a project with the stated objectives of: *"to increase the usability of Ohio's available Data Tools, the State will simplify data access by developing a series of Web Portals, with single sign-on capabilities, designed for specific constituent groups. Additionally, the existing Data Tools the state provides, including the Ohio Success website and D3A2, will be analyzed to determine where redundant functionality exists. Consolidation will follow, where applicable, to reduce confusion and improve user experience."*

In Fiscal Year 2012 ODE contracted with a third party to perform an analysis of the applications which comprise the existing Data Tools Catalog (*the ODE Data Tools Catalog can be found by visiting the Ohio Department of Education website (<http://education.ohio.gov>) and searching "Data Tools Catalog"*) and for proposing a solution for the creation of user group targeted Web Portals and proposing a corresponding Identity Management solution.

This analysis effort produced a series of work products and deliverables which have been considered in defining the scope of this implementation effort. These deliverables have been made available for the review and consideration of all prospective bidders. To view and download these materials visit:

<ftp://ftp.ode.state.oh.us/ODEMediaWeb/RttT%20RFQ/>

**Note** – In the case of any discrepancies between the recommendations made within the work product and deliverable documents and the requirements defined within this RFQ the RFQ is to be considered the correct source of information.

### Business Drivers

The Ohio Department of Education's existing Data Tools Catalog is comprised of 30+ applications. These applications are hosted in a variety of locations by a variety of state agencies, universities, organizations and vendors. The Data Tools are targeted at a variety of audiences, including school administrators, principals, teachers, parents, students, community organizations, etc. Security of these applications ranges from non-existent (open to the general public), to user generated accounts, to Superintendent controlled access, to the requirement of an ODE SAFE account, etc.

The aforementioned analysis has shown that utilization of these Data Tools, in many instances, requires the user to maintain multiple URLs, multiple user names and multiple passwords. In order to simplify access to these Data Tools and enhance the overall user experience ODE has accepted the analysis recommendations to implement a Data Tools Web Portal, a secure My Data Tools page, and a corresponding Identity Management solution.

### Objectives

The Ohio Department of Education has the following objectives and it will be the vendor's obligation to ensure that the Work meets these objectives:

- The implementation of a solution meeting the documented requirements of a public facing Ohio Department of Education (ODE) Data Tools Web Portal which will be a component of the existing Ohio Department of Education's website
- The implementation of a solution meeting the documented requirements of a secure, role based, user configurable My Data Tools Page
- The implementation of a solution meeting the documented requirements of an Identity Management solution enabling Administrator and Educator access to secure ODE Data Tools, and the My Data Tools page

The specific requirements of these implementations can be found within the supporting documents as outlined within the Project Background section of this RFQ.

The vendor will be responsible for delivery of all items outlined within the Scope Inclusions and Key Project Deliverables sections of this RFQ. Responses should include details as to how the vendor proposes meeting all documented scope inclusions and key deliverables.

### Scope

#### Scope Inclusions

- Adherence to prescribed ODE project management and work approach requirements
- Delivery of all project artifacts as defined in the Work Approach section of this RFQ
- Development of a comprehensive project management plan, including the following:
  - Project Schedule
  - Project Staffing Plan
  - Project Quality Plan
  - Project Risk Management Plan/Risks and Assumptions Logs
  - Project Communications Plan
- Implementation of a solution meeting the documented requirements of a public facing Ohio Department of Education (ODE) Data Tools Web Portal
  - Vendor submissions must include a proposed Data Tools Web Portal technology recommendation utilizing either SharePoint 2010 or .Net 4.0
  - The Portal will meet all documented requirements (*See Final Deliverables published as supporting documentation*)
  - The Portal will adhere to all applicable ODE standards
  - Including Deployment Plan and Release Readiness Review
- Implementation of a solution meeting the documented requirements of a My Data Tools Page
  - Vendor submissions must include a proposed My Data Tools Page technology recommendation utilizing either SharePoint 2010 or .Net 4.0
  - The Page will meet all documented requirements (*See Final Deliverables published as supporting documentation*)
  - The Page will adhere to all applicable ODE standards
  - Including Deployment Plan and Release Readiness Review
- Implementation of a solution meeting the documented requirements of an Identity Management solution
  - The scope of the Identity Management solution will be limited to Educators and Administrators
  - The Identity Management solution will utilize Microsoft Unified Access Gateway (UAG)

<p>with Microsoft Active Directory Federation Services (ADFS) for authentication purposes</p> <ul style="list-style-type: none"> <li>○ The Identity Management solution will utilize ODE's SAFE/OEDS systems for identity management and storage purposes (Educators and Administrators)</li> <li>○ The Identity Management solution will meet all documented requirements (<i>See Final Deliverables published as supporting documentation</i>)</li> <li>○ The Identity Management solution will adhere to all applicable ODE standards</li> <li>○ Including Deployment Plan and Release Readiness Review</li> </ul> <ul style="list-style-type: none"> <li>• Creation of and adherence to a Master Test Plan</li> <li>• Performance testing and tuning of all implementations</li> <li>• User acceptance testing of all implementations</li> <li>• Detailed end use documentation for all implementations</li> <li>• System administrator training for all implementations/knowledge transfer</li> <li>• Release Readiness Review activities</li> <li>• Launch support</li> </ul> <p><b>Scope Exclusions</b></p> <ul style="list-style-type: none"> <li>• Procurement of any hardware, software, or applicable licensing</li> <li>• The scope of the Identity Management solution will not include Student and Parent identities</li> <li>• Consolidation of any existing data tools identified as candidates for consolidation within the Data Tools Catalog Recommendations Report</li> </ul>
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<b>Risk Identification</b>
<ul style="list-style-type: none"> <li>• Data Tools Web Portal: ODE Website Redesign – ODE is in the process of conducting an analysis with the intent of redesigning the ODE public-facing website. This analysis is scheduled to be complete by June of 2012 and will directly impact the design of the Data Tools Web Portal</li> <li>• Data Tools Web Portal and My Data Tools Page – If SharePoint 2010 is utilized it must be noted that ODE is planning a migration to SharePoint 2012 prior to the end of calendar year 2012. All implemented solutions should be as forward compatible as possible</li> <li>• Identity Management: Data Tool Framework - Some data tools may use non-standard HTML or plugins that confuse the UAG reverse proxy. If such tools do not support SAML, it may be impossible to implement single sign-on for them</li> <li>• Identity Management: Future Scalability – The Identity Management solution will initially be implemented to include only Educator and Administrator identities but must be designed in such a manner that future scaling to include Student and Parent identities is possible</li> </ul>
<b>Assumptions</b>
<ul style="list-style-type: none"> <li>• ODE will supply all necessary hardware, software, and applicable licensing</li> </ul>

## WORK APPROACH

<b>Project Management</b>
<p>The ODE Project Manager will monitor the project and provide vendor oversight. The ODE Project Manager will be the single point of contact between the vendor and ODE staff, both technical and business. Management of the project and vendor project team is the responsibility of the vendor.</p> <p>The project will be managed using the Project Management Body of Knowledge (PMBOK) framework and methodologies. Adherence to PMBOK and PMCOP project management methodology is defined in the ODE PMO Guide and policy statements, the OIT PMCOP and includes, but is not limited to:</p>

- Stakeholder management (project definition, governance, stakeholder buy-in)
- Estimating and planning (controlled estimation, planning, change control)
- Monitoring and reporting (progress metrics, reporting to business and technology stakeholders)
- Financial and business case control (budget management, financial control, benefit tracking)
- Supplier management (statement of work, task order, progress management)
- Risk and issue management (active management of risks, issues and mitigation)
- Configuration management (tight control of project deliverables)
- Quality management (devise and apply acceptance criteria, demonstrate compliance)
- Knowledge management (using existing knowledge base, project knowledge transfer).

The following project management artifacts are required:

- Project Management Plan
- Project Schedule
- Meeting Minutes
- Weekly Status Reports
- Monthly Executive Status Reports
- Issues Log
- Risk Log
- Deliverables Acceptance
- Project Closeout Report

#### **Major Activities**

- Create project management plan
- Solicit approval of all solution designs from ODE stakeholders
- Implement solutions
- Performance test and tune solutions
- Create end user documentation
- Launch support and knowledge transfer
- Creation/ongoing maintenance of project management artifacts
- Submit all final deliverables for approval
- Project closeout

#### **Status Reporting**

The vendor will provide weekly status reports and attend regular scheduled weekly status meetings. Detailed project tasks and work items will be stored in and reported through ODE Microsoft SharePoint site for this project.

#### **Schedule**

The vendor will develop the project schedule, to be reviewed and approved by the ODE project manager. It will be stored on the project's SharePoint. They will be made available to the entire project team, ODE ITO management and business sponsors and users. The vendor will be responsible for meeting all timelines designated and agreed by ODE project manager and business sponsors.

#### **Vendor Personnel**

The vendor is responsible for replacing, in a timely manner, any personnel whose skills the ODE determines to be inadequate to perform the tasks required. The vendor must obtain equally-qualified replacement personnel for any personnel who become unavailable during the course of the project.

The Contractor agrees that it is a separate and independent enterprise from the state and from the Department. This contract is not to be construed as creating any joint employment relationship between the Contractor and the Department or the State of Ohio.

**Participation in Meetings**

The vendor will participate in meetings with personnel or groups recommended by the ODE project manager.

**Standards Compliance**

The Ohio Department of Education (ODE) requires the use of Microsoft Team Foundation Server (TFS) for all software development tasks, such as requirements, work items, and automated testing.

ODE has developed the following standards documents, which vendors are required to adhere to over the course of the project:

- ODE Database Standards
- Application Development Standards
- Web Standards
- Testing Standards
- Project Management Standards
- Infrastructure Standards
  - Desktop
  - Network
  - Server (Application, Database, Web, OS)
  - Storage

All vendor staff working on ODE projects are required to review the ODE Information Security policies and sign an ODE Information Security and Confidentiality Certification form when complete.

In addition, the following documents—available from the ODE Project Manager—are part of ODE's standards document library:

- ODE .NET Framework Assembly Documentation
- BUILD Process Documentation
- SAFE Documentation

The vendor should be aware that these documents may be revised either prior to contract award or shortly thereafter and factor that cost fluctuation into their proposal. Areas of change may include:

- Additional components in the ODE .NET framework
- .NET framework

To ensure compliance with ODE development standards, the vendor is required to participate in a regularly scheduled code review sessions with ODE System Architects. These sessions typically require one to two hours of the technical lead's time per week.

**Microsoft Project**

ODE requires the use of Microsoft Project with all of its projects.

**Non-Disclosure Agreement**

Both candidate and company will be required to sign non-disclosure agreements which prevent disclosure of any data obtained while on the engagement which can be used to personally identify any parties at anytime either during or after the engagement.

### Training

Training defines the activities for providing adequately trained personnel. As such, all new applications and any major enhancements to existing applications require training as a deliverable. Training is required for both the end user and system administrator. ODE strives to create user-friendly applications that require minimal training and offer an email help feature, but makes initial training one of the final deliverables prior to contract closeout. Informal training is also facilitated through user involvement in testing during Quality Assurance (QA), providing exposure to the application and a level of comfort prior to use in the production environment.

## DELIVERABLES

### KEY PROJECT DELIVERABLES

#### Technical Artifacts

Key Deliverable	Responsibility	Acceptance Criteria	Approval Required
Project artifacts as defined in the Work Approach section of this document	Vendor	Approval from ODE Director of Project Management Office, and ODE Project Manager	Yes
Implementation of Web Portal Solution	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, ODE Project Manager, and ODE Communications Office	Yes
Implementation of My Data Tools Solution	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, ODE Project Manager, and ODE Communications Office	Yes
Implementation of Identity Management Solution	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager	Yes
Master Test Plan	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager	Yes



Performance Testing and Tuning	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager	Yes
User Acceptance Testing	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager	Yes
End User Documentation	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, ODE Project Manager, and ODE Communications Office	Yes
ODE Staff Training	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager	Yes
Deployment Strategy and Plan	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, ODE Project Manager, and ODE Communications Office	Yes
Release Readiness Review	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, ODE Project Manager, ODE Support Services, and ODE Communications Office	Yes
Launch Support	Vendor	Approval from ODE CIO, ODE Director of Enterprise Applications, and ODE Project Manager	Yes

## STAFFING

ODE assumes that the following staffing requirements would be required to execute the scope of the proposal. All resources will be required to complete their work on site at ODE (25 S. Front Street, Columbus, Ohio) but are not expected to remain at the location for the duration of the engagement. The vendor will determine the staffing level and appropriate onsite work schedule for each resource.

A resource may be assigned to more than one role; however, that resource must function in the role(s) to which he or she is assigned. More than one resource can be assigned to any of the listed roles, but at least one assigned resource must meet the listed *Skills Required* for that role. Any proposed candidate used to demonstrate that the vendor's proposed team meets the staffing requirements for a particular position/role must perform that role on the project. For example, if a particular candidate, John Doe, is proposed to demonstrate meeting the skill requirements for the "Business Analyst" role, then John Doe must be used on the project to perform tasks and activities requiring "Business Analyst" skills. John Doe's experience cannot be used to meet the "Business Analyst" skill requirements if the vendor has no intention of having John Doe perform a substantial portion of the tasks and activities requiring "Business Analyst" skills. If the vendor determines that a specified role is not necessary for the project's success, the proposal must include a detailed justification for that decision.

The vendor proposal must show how each candidate meets the required/preferred skill set. Just a resume will not be sufficient. A skills profile matrix demonstrating how each proposed resources meet the stated Required and Preferred Skills requirements must be provided.

**Note – The requirement to provide a SharePoint 2010 Developer and a .Net 4.0 Developer are dependent upon the vendor's proposed technology solutions for the Data Tools Web Portal and the My Data Tools Page. The vendor should ensure that the proposed project staff is adequate to support the proposed implementation.**

STAFFING REQUIREMENTS			
Resource	Type of Resource	Skills Required	Skills Preferred
Project Manager/Coordinator	Vendor	<ul style="list-style-type: none"> <li>• PMP Certification</li> <li>• Minimum 10 years IT experience</li> <li>• Minimum 5 years experience in managing projects leveraging developers and consultants</li> <li>• Minimum 5 years experience in a fixed bid relationship</li> <li>• Minimum 5 years experience with direct responsibility / accountability to senior executives (examples include Industry VPs, Agency Directors, Military 0-6 and above)</li> </ul>	<ul style="list-style-type: none"> <li>• Experience as a project manager on at least 1 project that included implementation of an Identity Management solution</li> <li>• Experience as a project manager in a state or federal environment (employee or consultant)</li> <li>• Experience as a project manager on at least 1 project involving state or national implementation of a technology solution</li> <li>• Experience with Microsoft Team Foundation Server</li> <li>• Experience with</li> </ul>

STAFFING REQUIREMENTS			
Resource	Type of Resource	Skills Required	Skills Preferred
		<ul style="list-style-type: none"> <li>Project management responsibility on a minimum of 2 projects that included data system consolidation</li> </ul>	<p>Microsoft SharePoint</p> <ul style="list-style-type: none"> <li>BS or MS in Information Technology related field</li> </ul>
Business Analyst/Requirements Analyst	Vendor	<ul style="list-style-type: none"> <li>Minimum 8 years overall IT experience.</li> <li>Minimum 5 years experience in business and requirements analysis</li> <li>Minimum 5 years experience writing use cases and/or storyboarding</li> <li>Business analyst responsibility on a minimum of 2 projects that included website/portal development</li> <li>Business analyst responsibility on a minimum of 2 projects that included implementation of an enterprise scale Identity Management solution</li> </ul>	<ul style="list-style-type: none"> <li>Experience in conducting JAD sessions</li> <li>Experience with a requirement management tool</li> <li>Experience with Team Foundation Server</li> <li>Experience with Microsoft SharePoint</li> <li>BS or MS in Information Technology related field</li> <li>Relevant certifications</li> </ul>
.Net 4.0 Developer <i>(Requirement of resource dependent upon vendor's proposed solution)</i>	Vendor	<ul style="list-style-type: none"> <li>Minimum of 8 years IT experience</li> <li>Minimum of 3 years .Net 2.0 and 3.0 development experience</li> <li>Minimum of 2 years .Net 4.0 development experience</li> <li>At least one project of similar size and scope as the Data Tools Web Portal and/or My Data Tools Page implementation</li> </ul>	<ul style="list-style-type: none"> <li>Experience in automated unit testing using either NUnit or Visual Studio Team System unit test</li> <li>Experience in documentation testing using either nDoc or SandCastle</li> <li>Experience with Team Foundation Server</li> <li>Experience with Microsoft SharePoint</li> <li>BS or MS in related field (Computer Science, etc.)</li> <li>Relevant Microsoft</li> </ul>

STAFFING REQUIREMENTS			
Resource	Type of Resource	Skills Required	Skills Preferred
			certifications
SharePoint 2010 Developer  <i>(Requirement of resource dependent upon vendor's proposed solution)</i>	Vendor	<ul style="list-style-type: none"> <li>• Minimum of 8 years IT experience</li> <li>• Minimum of 2 years experience using Visual Studio, SharePoint Designer, and/or other tools to develop moderately complex tools and applications (e.g. leveraging web services, database driven (including non-SQL Server back ends), workflows, identity based authorization, etc.) on Microsoft SharePoint 2007 and/or 2010 projects</li> <li>• At least one project of similar size and scope as the Data Tools Web Portal and/or My Data Tools Page implementation</li> </ul>	<ul style="list-style-type: none"> <li>• Experience in automated unit testing using either NUnit or Visual Studio Team System unit test</li> <li>• Experience in documentation testing using either nDoc or SandCastle</li> <li>• Experience with Team Foundation Server</li> <li>• Experience with Microsoft SharePoint</li> <li>• BS or MS in related field (Computer Science, etc.)</li> <li>• Relevant Microsoft certifications</li> </ul>
System Architect	Vendor	<ul style="list-style-type: none"> <li>• Minimum 8 years experience developing applications in IT</li> <li>• Minimum 5 years in understanding relational database models and developing database queries</li> <li>• Minimum 5 years experience architecting complex solutions using ASP.NET</li> <li>• Minimum 2 years experience in architecting/developing SOA (preferably .NET Web Services)</li> <li>• Minimum 2 years experience in</li> </ul>	<ul style="list-style-type: none"> <li>• Experience with architecting solutions that run on a multilayer and multi-tier environment</li> <li>• Experience architecting solutions using Visual Studio 2010, and TFS 2010</li> <li>• Experience in ASP.NET AJAX</li> <li>• Experience in XML, XSLT, XPATH</li> <li>• Experience in automated unit testing using either NUnit or Visual Studio Team System unit test</li> <li>• Experience in</li> </ul>

STAFFING REQUIREMENTS			
Resource	Type of Resource	Skills Required	Skills Preferred
		<p>architecting solutions using .NET 2.0 or above</p> <ul style="list-style-type: none"> <li>• Minimum 1 year experience architecting solutions using .NET 3.0 or above</li> <li>• Minimum 1 year experience in architecting solutions using ASP.NET AJAX</li> <li>• Minimum 1 year experience in Microsoft Visual Studio Team System/TFS</li> <li>• Minimum 5 years experience architecting enterprise scale Identity Management solutions (Federated and Centralized)</li> <li>• Minimum 5 years experience architecting reduced sign-on/Web Portals solution utilizing recognized industry standards (e.g. LDAP or SAML)</li> <li>• Previous experience on at least one project as the system architect of an enterprise scale Identity Management solution utilizing Microsoft Unified Access Gateway (UAG) with Microsoft Active Directory Federation Services (ADFS) for authentication purposes</li> </ul>	<p>documentation testing using either nDoc or SandCastle</p> <ul style="list-style-type: none"> <li>• Experience with Team Foundation Server</li> <li>• Experience with Microsoft SharePoint</li> <li>• BS or MS in related field (Computer Science, etc.)</li> <li>• Relevant Microsoft certifications</li> </ul>
Testing Analyst	Vendor	<ul style="list-style-type: none"> <li>• Minimum 5 years experience in developing/testing software and identity management applications</li> </ul>	<ul style="list-style-type: none"> <li>• Experience in automated unit testing using either NUnit or Visual Studio Team System unit test</li> <li>• Experience in documentation testing</li> </ul>

STAFFING REQUIREMENTS			
Resource	Type of Resource	Skills Required	Skills Preferred
		<ul style="list-style-type: none"> <li>• Minimum 3 years experience in testing web-based applications, preparing test cases, leading users and technical staff in best practices for unit, integration, regression testing and user acceptance testing</li> <li>• Minimum 2 years experience in automated testing using test scripts</li> <li>• Minimum 2 years experience in manual testing</li> <li>• Minimum 6 months experience in Visual Studio Team Edition 2010 for Software Testers</li> </ul>	<p>using either nDoc or SandCastle</p> <ul style="list-style-type: none"> <li>• Experience with Team Foundation Server</li> <li>• Experience with Microsoft SharePoint</li> <li>• BS or MS in related field (Computer Science, etc.)</li> <li>• Relevant certifications</li> </ul>
Technical Writer	Vendor	<ul style="list-style-type: none"> <li>• Minimum 8 years overall IT experience</li> <li>• Minimum 5 years experience in technical writing and editing</li> </ul>	<ul style="list-style-type: none"> <li>• Experience in developing and editing project and technical documentation</li> <li>• Experience in developing system administration manuals</li> <li>• Experience in developing user manuals</li> <li>• Experience with Team Foundation Server</li> <li>• Experience with Microsoft SharePoint</li> <li>• BA or MA in related field</li> </ul>

## ROLES AND RESPONSIBILITIES

FUNCTIONAL AREA	REQUIRED ROLE	RESPONSIBILITIES	STAFF
Business Center	Executive Sponsor	Represents business interests of the project. Fulfills the following responsibilities: <ul style="list-style-type: none"> <li>Provides commitment to the project</li> <li>Provides guidance on policy</li> <li>Signs off on deliverables</li> <li>Reviews and signs off on project deliverables</li> </ul>	ODE
Business Center	Subject Matter Experts (SMEs)	Represent the end-user interests of the project. Fulfill the following responsibilities: <ul style="list-style-type: none"> <li>Provide output requirements (data and design)</li> <li>Provide design recommendations for data input</li> <li>Provide insight on usability</li> </ul>	ODE
Information Technology Office	Technology Sponsor	Represents technology interests of the project. Fulfills the following responsibilities: <ul style="list-style-type: none"> <li>Provides guidance for technological issues</li> <li>Provides guidance on policy issues</li> <li>Makes decisions on issues escalated by the Applications Development Manager</li> <li>Ensures that required ODE technical resources are available</li> </ul>	ODE CIO

FUNCTIONAL AREA	REQUIRED ROLE	RESPONSIBILITIES	STAFF
PMO	Project Manager	<p>Represents ODE Project Management Office interests of the project. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> <li>• Creates the SOW</li> <li>• Selects the contractor</li> <li>• Develops the high level project schedule</li> <li>• Approves vendor invoices</li> <li>• Manages scope change and control</li> <li>• Reports progress and escalates problems as needed to Project Executive Sponsors</li> <li>• Reviews project deliverables</li> <li>• Provides project oversight</li> <li>• Interfaces with vendor representatives</li> </ul>	ODE (Assigned Project Manager)
Application Development	Application Manager	<p>Represents ODE Application Development office interests of the project. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> <li>• Manages all .NET environments</li> <li>• Reviews and approves code, testing and technical deliverables</li> <li>• Attends all status meetings during which technological issues will be discussed.</li> </ul>	ODE



FUNCTIONAL AREA	REQUIRED ROLE	RESPONSIBILITIES	STAFF
Data Services	Data Manager	<p>Is involved throughout the application development lifecycle. Ensures that the data needs of the customer are being met and that data standards are being followed. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> <li>• Is involved in the gathering of requirements</li> <li>• Reviews the project documentation</li> <li>• Conducts reviews of the data model to support the application</li> <li>• Understands and identifies data that exists in other systems/data stores</li> <li>• Attends all status meetings during which data, data models, reports, Extraction Transformation Loads (ETLs), and data exchanges will be discussed</li> <li>• Conducts a required Forms Review</li> </ul>	ODE
ITO Enterprise Applications	Database Administrator	<p>Represents ODE Application Development office interests of the project. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> <li>• Reviews and approves the data model</li> <li>• Executes database scripts in QA and Production</li> <li>• Moves / updates tables in QA and Production</li> </ul>	ODE
ITO Enterprise Applications	Infrastructure Manager	<p>Represents ODE Technical Services office interests of the project. Fulfills the following responsibilities</p> <ul style="list-style-type: none"> <li>• Provides assistance and direction regarding servers, software, bandwidth, etc.</li> </ul>	ODE

## MANAGEMENT APPROACH

### DELIVERABLE ACCEPTANCE MANAGEMENT

Project key deliverables and products will be approved by staff assigned in the Deliverables Section. All approved deliverables require a hand written signature of appropriate staff member. A Deliverables Log must be attached to the regular project status report. A deliverable log will be submitted to the ODE Project Manager at each iteration of the project. This log will allow payment towards the payment schedule for the project. Payment will be based on acceptance of deliverable.

### ISSUES AND PROBLEM MANAGEMENT

The project will capture, prioritize, resolve, escalate, and monitor reported issues in the project SharePoint.

The Issues log will be included as part of regular status reports and weekly status meetings.

## PROGRESS REPORTING AND COMMUNICATIONS

### PROJECT STATUS REPORTS

Type of Status Report	Due	Purpose
Weekly Workgroup Status Report	TBD	To enable the project manager to monitor and control the progress of the project and update the Project Plan. If there are several workgroups involved, the project manager consolidates the weekly reports and updates the Project Plan with actual hours and estimate to complete. The consolidated version is distributed to the project team.
Monthly Status Report	TBD	To communicate project progress to the project sponsor and steering committee.

### OTHER COMMUNICATION STRATEGIES

Communication Strategy	Purpose
PMO Sharepoint Site	<ul style="list-style-type: none"> <li>Track risks and issues</li> <li>Store and share working documents</li> <li>Store final documents and deliverables</li> </ul>

## BUDGET

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BUDGET
<b>Vendor Payment Process</b>
This is a fixed bid proposal that will follow a Vendor/State STS Agreement.
<b>Terms and Conditions</b>
Vendor/State STS Agreement
<b>Termination Provisions</b>
Vendor/State STS Agreement

## POST-PRODUCTION SUPPORT

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POST-PRODUCTION SUPPORT
<b>Defects and Response Time</b>
<p>Vendor will correct defects on the developed components during implementation and for 90 days from the date final acceptance is received.</p> <p>Acknowledgement of a potential defect item will be returned via email within 24 hours. Issue resolution should begin within 48 hours and continue on site until resolved.</p>
<b>Support</b>
<p>Vendor proposals shall include a time and materials hourly rate to provide the State the option to purchase post-production support and/or enhancements. Any post-production support cost estimates should not be included in the vendor's cost estimates for implementation of the scope of work of this RFQ.</p>

## VENDOR PROPOSAL

### Vendor Proposal Requirements

Submitting vendors will provide a Vendor Proposal on company letterhead that includes the total contract cost, proposed payment schedule, company qualifications, sub-contractor qualifications if applicable, resource resumes, a skills profile matrix demonstrating how each proposed resources meet the stated Required and Preferred Skills requirements, your company's development and project management approach, and any other information required to determine your ability to deliver the required services. The proposal should demonstrate your understanding of the project. The quote must also include your STS number.

Prospective vendors will be required to: A) read and understand Executive Order 2011-12K, B) complete the Standard Affirmation and Disclosure Form related to the Executive Order, and C) sign the Standard Terms and Conditions related to the Executive Order.

**Note** - During the performance of this contract, the vendor shall not change the location(s) of the country where services are performed, or change the location(s) of the country where the data are maintained or made available without prior written approval of the Department, if applicable.

Send your proposal offering via email ([jerry.pallante@ode.state.oh.us](mailto:jerry.pallante@ode.state.oh.us)) with a copy to the ODE Agency Procurement Officer ([amadu.sankoh@ode.state.oh.us](mailto:amadu.sankoh@ode.state.oh.us)) **on date and time as provided on the title page.**

**Note** - All information contained in a vendor proposal is considered public information unless disclosure is prohibited by state or federal law.

STANDARD AFFIRMATION AND DISCLOSURE FORM

EXECUTIVE ORDER 2011-12K

Governing the Expenditure of Public Funds on Offshore Services

All of the following provisions must be included in all invitations to bid, requests for proposals, state term schedules, multiple award contracts, requests for quotations, informal quotations, and statements of work. This information is to be submitted as part of the response to any of the procurement methods listed.

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By the signature affixed hereto, the Contractor affirms, understands and will abide by the requirements of Executive Order 2011-12K. If awarded a contract, both the Contractor and any of its subcontractors shall perform no services requested under this Contract outside of the United States.

The Contractor shall provide all the name(s) and location(s) where services under this Contract will be performed in the spaces provided below or by attachment. Failure to provide this information may subject the Contractor to sanctions. If the Contractor will not be using subcontractors, indicate "Not Applicable" in the appropriate spaces.

1. Principal location of business of Contractor:

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State, Zip)

Name/Principal location of business of subcontractor(s):

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Address, City, State, Zip)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Address, City, State, Zip)

2. Location where services will be performed by Contractor:

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State, Zip)

Name/Location where services will be performed by subcontractor(s):

_____	_____
(Name)	(Address, City, State, Zip)

_____	_____
(Name)	(Address, City, State, Zip)

3. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor:

_____	_____
(Address)	(Address, City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained or backed-up by subcontractor(s):

_____	_____
(Name)	(Address, City, State, Zip)

_____	_____
(Name)	(Address, City, State, Zip)

_____	_____
(Name)	(Address, City, State, Zip)

_____	_____
(Name)	(Address, City, State, Zip)

_____	_____
(Name)	(Address, City, State, Zip)

Contractor also affirms, understands and agrees that Contractor and its subcontractors are under a duty to disclose to the State any change or shift in location of services performed by Contractor or its subcontractors before, during and after execution of any Contract with the State. Contractor agrees it shall so notify the State immediately of any such change or shift in location of its services. The State has the right to immediately terminate the contract, unless a duly signed waiver from the State has been attained by the Contractor to perform the services outside the United States.

On behalf of the Contractor, I acknowledge that I am duly authorized to execute this Affirmation and Disclosure form and have read and understand that this form is a part of any Contract that Contractor may enter into with the State and is incorporated therein.

By: \_\_\_\_\_

Contractor

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

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STANDARD TERMS AND CONDITIONS

EXECUTIVE ORDER 2011-12K

Governing the Expenditure of Public Funds on Offshore Services

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The Contractor affirms to have read and understands Executive Order 2011-12K and shall abide by those requirements in the performance of this Contract. Notwithstanding any other terms of this Contract, the State reserves the right to recover any funds paid for services the Contractor performs outside of the United States for which it did not receive a waiver. The State does not waive any other rights and remedies provided the State in this Contract.