

## STAFF AUGMENTATION REQUEST FOR QUOTE

| STAFF AUGMENTATION RFQ COVER SHEET   |  |
|--|--|
| <b>Doc ID:</b>   | <b>EDUQ201102600</b>                     |
| <b>Project Name:</b>   | RttT Grant Support – IIS Project Manager |
| <b>Open To:</b>  | MBE State Term Schedule Vendors Only     |
| <b>Quote Due Date:</b>   | February 16, 2011                        |
| <b>Inquiry:</b>  | Post Questions Online Only               |
| COMMENTS   |  |
| <p>The Ohio Department of Education (ODE) Office of Information Technology/Operations would like to announce the opportunity for MBE State Term Schedule vendors to submit candidate resumes for a Project Manager to assist the department with efforts related to Race to the Top federal grant, specifically the development and/or purchase of the state Instructional Improvement System.</p> <p>Attached you will find the Statement of Work (SOW) for this project detailing the project scope, deliverables, responsibilities, skills, and experience required for this position.</p> <p>Please provide resumes and associated rates for FY 2011, ending June 30, 2011, using 550 hours. In addition, please have your proposed candidate complete the associated Pre-Interview Questionnaire and include the completed document with your submission.</p> <p>Send your candidate offerings to me via email (<a href="mailto:Marsha.Ward@ode.state.oh.us">Marsha.Ward@ode.state.oh.us</a>) and a copy to the agency procurement officer (<a href="mailto:Amadu.Sankoh@ode.state.oh.us">Amadu.Sankoh@ode.state.oh.us</a>) by 5:00 PM on <b>Wednesday, February 16, 2011</b>. Please submit no more than two qualified candidates.</p> <p>Assumptions:</p> <ul style="list-style-type: none"> <li>• All proposed candidates are available between March 1 and March 5 for an onsite interview.</li> <li>• All work will be performed on site at ODE offices located at 25 South Front Street, Columbus and will begin on or about March 28, 2011 after creation of the purchase order.</li> <li>• No travel costs or delays to start date will be compensated by ODE.</li> <li>• Final selection will be based on highest evaluation score. The evaluation score may be influenced by cost, initial screening score, and/or interview score.</li> </ul> <p>Only candidates explicitly meeting the minimum requirements as defined in the Statement of Work will be considered for this position. I will not be taking phone calls regarding this request. If you have any questions pertaining to this opportunity, please contact me by posting your question online so that other interested vendors could share the response online.</p> <p><b>Note:</b> All information contained in a vendor proposal is considered public information unless disclosure is prohibited by state or federal law.</p> |  |

## STAFF AUGMENTATION STATEMENT OF WORK

### PROJECT IDENTIFICATION

| PROJECT IDENTIFICATION                   |         |               |
|--|---------|---------------|
| Project Name                             |         | Date Created  |
| RttT Grant Support – IIS Project Manager |         | 11/8/2010     |
| Prepared by                              | Version | Project Class |
| Marsha Ward / Amadu Sankoh               | 2.5     | A             |

### PROJECT INFORMATION

| PROJECT REQUEST   |
|---|
| <p>This Statement of Work (SOW) identifies work to be performed under the anticipated contract to provide the Ohio Department of Education (ODE) Project Management Office (PMO) a full-time PMP certified project manager to manage the planning, controlling, executing and completion of the Instructional Improvement System (IIS) as defined in Ohio's Race to the Top (RttT) application. The individual will also assist with other ODE initiatives as appropriate.</p> <p>The work to be completed under this contract will be time and materials based and will commence on or after March 28, 2011 and end June 30, 2011. The hours of support paid under this contract will not exceed 550 hours for FY2011. The continued need for this resource will be assessed at the end of each fiscal year for possible extension through the life of the federal Race to the Top Grant and the IIS project. Accordingly, any and all extensions of a contract under this RFQ shall terminate on the earlier of the scheduled termination date or upon termination of the contractor's State Term Schedule. All extensions shall be limited to one fiscal year at a time, beginning July 1 and ending June 30 of the following year. No future extensions shall be made beyond June 30, 2015.</p> <p>The work will be performed at the ODE offices at 25 S. Front St., Columbus, Ohio 43215. There may be circumstances in which the contractor must accompany an ODE project team member to other locations within the state – ITC, School District, etc.</p> <p>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.</p> |
| Project Background  |
| <p>In 2010, the state of Ohio was awarded a \$400,000,000 federal Race to the Top stimulus grant. Over half of the grant award will be distributed directly to participating school districts. The remaining funds will be used by ODE to develop professional development and other tools to be used by districts to transform education in Ohio.</p> <p>There are numerous IT projects included in the approved Ohio plan. One of them is the development of a qualifying state level IIS (State IIS). The federal definition of an IIS is of a tool or suite of tools that provides access to the standards and curriculum, planning, interim assessments, data gathering, reporting, and assessment at the classroom level. ODE, with the assistance of the Center for Education Leadership and Technology (CELt), has begun gathering the requirements for the State IIS.</p>  |

**Business Drivers**

The IIS is a multi-million dollar development and/or purchase effort, requiring a dedicated project manager. ODE does not currently have the staff with available time to manage the initiative.

**Scope**

The work of the contractor is to support the ODE PMO in its efforts to successfully implement the State IIS and other RttT IT projects. The selected Project Manager will be responsible for delivery of the assigned projects including Planning, Risk & Issue Management, Change Control, Documentation, Budget, Resource Planning, Software Analysis & Selection, Tracking & Reporting, and Stakeholder Management.

The individual will be responsible for completing Stimulus Reporting for the assigned projects as appropriate.

The individual will be under the direction of the Director of the PMO.

**Position Objectives**

The objective of this position is to provide full life cycle project management services in support of the development of the State IIS as well as other Race to the Top IT initiatives as needed.

**Skills and Experience**

The selected candidate is required to have the following:

Minimum skills and experiences:

- 10 years IT experience
- PMP Certification
- 5 years practical project management experience with budget responsibility
- 2 years experience with direct responsibility/accountability to senior executives (examples include Industry VPs, Agency Directors, Military O-6 and above)
- Project management responsibility on 2 projects that included software evaluation and selection
- Project management responsibility on at least 1 multi-million dollar project that spanned across several years
- 5 years experience in business analysis and requirements definition conducting facilitated JAD sessions

Preferred skills and experiences:

- Experience as a project manager in a state or federal environment (employee or consultant)
- Experience as a project manager on at least one project involving state or national implementation of a technology solution
- Experience with Microsoft Team Foundation Server
- Experience with Microsoft SharePoint
- Bachelor's Degree in Information Technology, Business, or appropriate field of study
- Excellent oral and written communication skills
- Critical thinker with excellent problem solving skills that can make independent decisions within area of responsibility and expertise
- Works well in and supports a distributed team environment and is adaptive to changes in methodologies and technologies

## WORK APPROACH

### PROJECT MANAGEMENT

The IIS project will be managed by the Contracted Project Manager using practices established by the ODE PMO using Project Management Body of Knowledge (PMBOK) framework and methodologies. Issues Management and Change Management are addressed therein and the use of these processes will ensure adequate oversight of the effort.

Adherence to PMBOK and PMCOF project management methodology is defined in the ODE PMO Guide and policy statements, the OIT PMCOF and includes, but is not limited to:

- 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)
- Project team management (goal-setting, briefing, motivation, performance feedback)

ODE requires the use of Microsoft Project and Microsoft SharePoint with all projects.

### Status Reporting

The contractor will provide status reports on the same cycle as the timesheets required by their firm. Timesheets and status reports will be reviewed and signed by the Director of the PMO and will accompany invoices submitted to the PMO for payment.

The contractor will fully participate in PMO status reporting activities through the use of activity reports, management reports, project reports and any other status requirement as it occurs.

### Microsoft Project

ODE requires the use of Microsoft Project and MS SharePoint with all projects.

### Schedule

The contractor will be responsible for meeting all timelines designated by the Director of the PMO. The contractor's daily work schedule will be dictated by the needs of the project and agreement with the Director of the PMO.

| <b>Participation in Meetings</b>  |
|---|
| The contractor will participate in meetings with personnel or groups recommended by the CIO and/or Director of PMO.   |
| <b>Vendor Personnel</b>   |
| 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. If a suitable candidate is not offered, the engagement will cease.   |
| <b>Acceptance Criteria</b>  |
| Only candidates meeting all of the minimum requirements will be considered for this engagement.   |
| <b>Non-Disclosure Agreement</b>   |
| The candidate will be required to sign a non-disclosure agreement that prevents 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. At the direction of the Office of Information Technology, the contractor's company will be precluded from bidding on development work which results from the work of this candidate. |

## **DELIVERABLES**

| <b>KEY DELIVERABLES</b>   |
|---|
| Although this is a time and materials engagement, rather than a deliverables-based engagement, some of the work may require a formal signoff. The PM will be responsible for SDLC documents as required in the PMO Policies and Procedures. |

## **ROLES AND RESPONSIBILITIES**

| <b>FUNCTIONAL AREA</b> | <b>REQUIRED ROLE</b>            | <b>RESPONSIBILITIES</b>  | <b>STAFF</b>                              |
|------------------------|---------------------------------|--|---|
| RttT Administration    | Project 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> </ul>   | Michael Sawyers, Assistant Superintendent |
| ITO                    | Technology and Business Sponsor | Represents technology and business 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 PMO</li> </ul> | Beth Juillerat, CIO                       |

| FUNCTIONAL AREA | REQUIRED ROLE                     | RESPONSIBILITIES   | STAFF  |
|-----------------|-----------------------------------|--|--|
| ITO/PMO         | Project Management Office Sponsor | <p>Represents ODE Project Management Office interests of the project. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> <li>• Provides resource(s) for project management duties</li> <li>• Participates in vendor selection</li> <li>• Approves or disapproves 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 consultant deliverables</li> <li>• Provides interfaces with vendor company officers</li> </ul> | Marsha Ward,<br>Director of the PMO                      |
| Data Services   | Data Manager                      | <p>Is involved throughout the application and database development lifecycle. Ensures that applicable data standards are being followed. Fulfills the following responsibilities:</p> <ul style="list-style-type: none"> <li>• Reviews and assists in the development of project documentation</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> </ul>             | Matt Danzuso,<br>Manager of the ODE Data Management Team |

## SCHEDULE AND BUDGET

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|--|
| <b>Vendor Payment Process</b>                                      |
| Vendor/State STS Agreement   |
| <b>Terms and Conditions</b>  |
| Vendor/State STS Agreement   |
| <b>Termination Provisions</b>                                      |
| Vendor/State STS Agreement   |
| <b>Standards Compliance</b>  |
| Adherence to all applicable ODE documented standards is mandatory. |

## CONTACT INFORMATION

| PROJECT CONTACT |                    |  |                             |
|-----------------|--------------------|--|-----------------------------|
| Name            | Title/Organization | Location                                   | Email                       |
| Marsha Ward     | Director, PMO      | 25 S. Front St, G-05<br>Columbus, OH 43215 | Marsha.ward@ode.state.oh.us |

## VENDOR SUBMISSION INFORMATION

| Vendor Submissions  |
|---|
| <p>Please provide the candidate resume and your associated hourly rate. The quote must be on company letterhead and include the STS category and associated STS rate, discounted rate if applicable, and the total proposed contract amount using 550 hours for FY2011. In addition, please have your proposed candidate complete the associated Pre-Interview Questionnaire and include the completed document with your submission.</p> <p>Submitting vendors will provide an executed Standard Affirmation and Disclosure Form per Executive Order 2010-09S shown below.</p> <p><b>Executive Order 2010-09S:</b> Banning the Expenditure of Public Funds for Offshore Services - Prospective Service Providers shall be required to:</p> <ul style="list-style-type: none"> <li>• Affirm that they understand and will abide by the requirements of this Order.</li> <li>• Disclose the location(s) where all services will be performed by any contractor or subcontractor.</li> <li>• Disclose the locations(s) where any state data associated with any of the services they are providing, or seek to provide, will be accessed, tested, maintained, backed-up or stored.</li> <li>• Disclose any shift in the location of any services being provided by the contractor or any subcontractor.</li> <li>• Disclose the principal location of business for the contractor and all subcontractors who are supplying services to the state under the proposed contract.</li> </ul> <p><b>Note</b> - 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.</p> <p>Send your candidate offering to me via email (<a href="mailto:marsha.ward@ode.state.oh.us">marsha.ward@ode.state.oh.us</a>) with a copy to the ODE Agency Procurement Officer (<a href="mailto:Amadu.sonkoh@ode.state.oh.us">Amadu.sonkoh@ode.state.oh.us</a>) by 5:00 PM on Wednesday, February 16, 2011. Please submit no more than two qualified candidates.</p> <p><b>An MS Word version of the Pre-Interview Questionnaire can be found on the Notification to IT Vendors page on the ODE website (<a href="http://www.education.ohio.gov">www.education.ohio.gov</a>).</b></p> <p><b>Note</b> - All information contained in a vendor proposal is considered public information unless disclosure is prohibited by state or federal law.</p> |

# DEPARTMENT OF ADMINISTRATIVE SERVICES

## STANDARD AFFIRMATION AND DISCLOSURE FORM

### EXECUTIVE ORDER 2010-09S

#### Banning 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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#### **CONTRACTOR/SUBCONTRACTOR AFFIRMATION AND DISCLOSURE:**

By the signature affixed to this response, the Bidder/Offeror affirms, understands and will abide by the requirements of Executive Order 2010-09S issued by Ohio Governor Ted Strickland. If awarded a contract, the Bidder/Offeror becomes the Contractor and affirms that both the Contractor and any of its subcontractors shall perform no services requested under this Contract outside of the United States. The Executive Order is attached and is available at the following website:

(<http://www.governor.ohio.gov/Default.aspx?tabid=1495>).

The Bidder/Offeror 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 as part of the response will deem the Bidder/Offeror not responsive and no further consideration will be given to the response. Bidder/Offeror's offering will not be considered. If the Bidder/Offeror 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)

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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 Sub-contractor(s):

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

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

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

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

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(Name)

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(Address, City, State, Zip)

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(Name)

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

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

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

4. Location where services to be performed will be changed or shifted by Contractor:

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

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

Name/Location(s) where services will be changed or shifted to be performed by subcontractor(s):

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

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(Address, City, State, Zip)

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(Name)

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(Address, City, State, Zip)

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(Name)

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(Address, City, State, Zip)

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

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

## PRE-INTERVIEW QUESTIONNAIRE

### PROJECT IDENTIFICATION AND CONTACTS

| PROJECT IDENTIFICATION     |                    |  |              |
|----------------------------|--------------------|--|--------------|
| Project Name               |                    |  | Date         |
| RttT – IIS Project Manager |                    |  | 1/20/2011    |
| ODE PROJECT CONTACTS       |                    |  |              |
| Name                       | Title/Organization | Email Address  | Phone        |
| Marsha Ward                | Director, PMO      | <a href="mailto:Marsha.ward@ode.state.oh.us">Marsha.ward@ode.state.oh.us</a> | 614-728-5117 |
| VENDOR CONTACTS            |                    |  |              |
| Vendor Name                | Candidate Name     | Account Manager Name, Email Address, and Phone                               |              |
|                            |                    |  |              |

### QUESTIONNAIRE

**Directions:** Please complete the following questionnaire, specifically addressing your experiences. Provide concise answers to all questions.

| QUESTIONNAIRE   |  |        |
|-----------------|--|--------|
| #               | Question   | Answer |
| Required Skills |  |        |
| 1               | How many years of IT experience do you have?   |        |
| 2               | Do you hold a PMP certification? If so, please provide your certification number.                                      |        |
| 3-a             | How many years project management experience do you have? Please list significant projects and length of each project. |        |

| QUESTIONNAIRE                   |  |        |
|---------------------------------|--|--------|
| #                               | Question   | Answer |
| 3-b                             | Please list the projects for which you had budget responsibility.  |        |
| 4                               | How many years experience do you have with direct responsibility/accountability to senior executives (examples include Industry VPs, Agency Directors, Military 0-6 and above). Please describe your role. |        |
| 5                               | Do you have project management experience for which you had responsibility for software evaluation and selection? Of so, please list the applicable projects.  |        |
| 6-a                             | Did you have project management responsibility for any projects with a budget of greater than \$1 million? If so, please list the applicable projects.   |        |
| 6-b                             | Did you have project management responsibility for any projects with a timeline that spanned over multiple years? If so, please list the applicable projects.  |        |
| 7                               | How many years experience do you have in business analysis and requirements definition conducting facilitated JAD sessions.  |        |
| Preferred Skills and Experience |  |        |
| 8                               | Do you have experience as a project manager in a state or federal environment as either an employee or a consultant? If so, please include the years and location.   |        |
| 9                               | Do you have experience as a project manager on at least one project involving state or national implementation of a technology solution? If so, please list the applicable projects.                       |        |
| 10                              | Do you have experience with Team Foundation Server? If so, please list significant projects and your role. Specifically, how did you use TFS on each project?  |        |

| QUESTIONNAIRE |   |        |
|---------------|---|--------|
| #             | Question  | Answer |
| 11            | How many years experience do you have using Microsoft SharePoint? Please include the aspects used (lists, shared documents, issues, workflow, discussion threads, etc.) |        |
| 12            | Please list any post-secondary degrees that you have earned. List the degree, specialty, date earned, and college or university.  |        |