

# STATE OF COLORADO

GOVERNOR'S OFFICE OF INFORMATION TECHNOLOGY

Enterprise Agreement for

**Implementers of Sales Force, Google, and  
Perceptive Solutions**

## RFP-001-JG-14

Governor's Office of Information Technology (OIT)

Procurement Office

601 E 18<sup>th</sup> Ave., Suite 150

Denver, CO 80203

[OITpurchasing@state.co.us](mailto:OITpurchasing@state.co.us)

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# REQUEST FOR PROPOSALS SIGNATURE PAGE

RFP INFORMATION			
RFP #:	<b>RFP-001-JG-14</b>	TITLE:	<b>Enterprise Agreement for Implementer Services</b>
SUBMIT INQUIRIES & SEALED PROPOSALS TO:			
Governor's Office of Information Technology (OIT)			
Procurement Office			
601 E 18 <sup>th</sup> Ave., Suite 150			
Denver, CO 80203			
Judy Giovanni			
303-764-7931			
<a href="mailto:OITpurchasing@state.co.us">OITpurchasing@state.co.us</a>			
Submit one (1) Original, one (1) Electronic Copy, and <b>5 Hard Copies.</b>			
OFFERORS CONTACT INFORMATION			
COMPANY NAME:		CONTACT:	
STREET ADDRESS:		PHONE:	
CITY/STATE/ZIP:		E-MAIL:	
FEIN:			
OFFEROR'S AUTHORIZED SIGNATURE			
AUTHORIZED SIGNATURE:			
PRINTED NAME:		TITLE:	

**IMPORTANT** The following information must be on the OUTSIDE of the sealed RFP response:

RFP Number and RFP Submission Deadline

**RETURN THIS PAGE WITH YOUR RESPONSE**

# SCHEDULE OF ACTIVITIES

ACTIVITY	DATE/TIME (MTN STD TIME)
RFP Notice Published on BIDS	As posted on BIDS (www.bidscolorado.com)
<b>Bid Submission Deadline</b>	As posted on BIDS (www.bidscolorado.com) <b>2:30 pm</b>
Oral Presentations/Site Visits/Best and Final Offers <sup>1,2</sup>	Optional and to be determined
Notice of Award Published on BIDS	As posted on BIDS www.bidscolorado.com)
Awarded Offeror Returns Signed Contract By <sup>1</sup>	October 1, 2013
Initial Contract Period <sup>3</sup>	11/1/2013 <b>thru</b> 10/31/2018

The resulting contract may be renewed for \*5 additional one year options, at the sole discretion of the State.

\*Pending Approval by the State Purchasing Director

1    Estimated

2    To be held at the discretion of the State, as applicable

3    No new work will be assigned to the winning vendor after the five year period but that the contract may extend for up to\* 10 years to assure that all work begun during the contract is completed.

\*Pending Approval by the State Purchasing Director

## **1. Administrative Information**

### **1. ISSUING OFFICE**

The Governor's Office of Information Technology (OIT), for the benefit of the State of Colorado (State), issues this Request for Proposals (RFP). The OIT Procurement Office and Purchasing Agent listed on the Request for Proposals Signature Page is the sole point of contact concerning this RFP. All communication must be done through the OIT Procurement Office.

### **2. BID INFORMATION AND DISTRIBUTION SYSTEM (BIDS) AND BIDS REGISTRATION**

This solicitation is published using the Colorado Bid Information and Distribution System (BIDS). Offerors must be registered on BIDS in order to download solicitation documents and information and to be considered responsive at the time of proposal submission. BIDS and its registration information may be accessed through the State Purchasing Office website at [www.bidscolorado.com](http://www.bidscolorado.com).

### **3. MODIFICATION OR ADDENDUM TO REQUEST FOR PROPOSALS**

In the event it becomes necessary to revise any part of this RFP, a modification/addendum will be published on the BIDS web page [www.bidscolorado.com](http://www.bidscolorado.com). It is incumbent upon Offerors to carefully and regularly monitor BIDS for any such postings.

### **4. INVITATION TO SUBMIT PROPOSALS**

OIT is posting this RFP on BIDS so that Offerors who have an interest may submit a proposal in accordance with terms of this RFP. Please read and be aware of the administrative information attached to this RFP.

### **5. PURPOSE**

This RFP provides prospective Offerors with sufficient information to prepare and submit proposals for consideration to satisfy the need for expert assistance in the completion of the scope of this RFP.

### **6. SCOPE**

This RFP contains the instructions governing the proposal to be submitted and the material to be included therein; mandatory requirements must be met to be eligible for consideration.

### **7. STRUCTURE OF THIS REQUEST FOR PROPOSALS**

The State of Colorado Solicitation Instructions and Terms and Conditions linked through the BIDS Solicitation Page govern, except as modified or supplemented in these instructions.

### **8. OFFICIAL MEANS OF COMMUNICATION**

During the solicitation process, for this RFP, all official communication will be via notices on BIDS. Notices may include any modifications to administrative or performance requirements, answers to inquiries received, clarifications to requirements, and the announcement of the awarded Offeror(s). It is incumbent upon Offerors to carefully and regularly monitor BIDS for any such notices.

### **9. INQUIRIES**

Unless otherwise noted, prospective Offerors may make written or electronic mail inquiries concerning this RFP to obtain clarification of requirements. E-mail is the preferred method for Offerors to submit inquiries. No inquiries will be accepted after the date indicated in the Schedule of Activities section of this RFP.

Clearly identify your inquiries by referencing the RFP number. Where appropriate include references to RFP section, paragraph and or question numbers; using page numbers as references is problematic because not all printers number the pages consistently.

Response(s) to Offeror's inquiries (if required) will be published as a modification(s) on the BIDS system in a timely manner. Offeror should not rely on any other statements, either written or oral, that alter any specification or other term or condition of this RFP. Offerors are responsible for monitoring BIDS for publication of modifications to this solicitation.

#### **10. OFFEROR REGISTRATION**

Offeror registration (BIDS Registration) MUST be current at the time and date of the Bid Submission Deadline, specific to this RFP, and as noted on the BIDS webpage. Offeror registration status is based on the Offeror's Federal Employer Tax ID Number (FEIN), as provided by the Offeror, on the Request for Proposals Signature Page. This FEIN shall be the number used to determine whether or if not an Offeror is registered. Only registered Offerors will be considered. Offerors shall be registered in accordance with the Service Provider Identification section of this RFP.

#### **11. SERVICE PROVIDER IDENTIFICATION**

The tax identification number provided must be that of the Offeror responding to the RFP. Offeror must be a legal entity with the legal right to contract in the State of Colorado and shall be the entity that is used to determine Offeror registration status.

#### **12. PARENT COMPANY**

If an Offeror is owned or controlled by a parent company, the name, main office address and parent company's tax identification number shall be provided in the proposal.

#### **13. MODIFICATION OR WITHDRAWAL OF PROPOSALS**

Proposals may be modified or withdrawn by the Offeror prior to the established due date and time.

#### **14. NEWS RELEASES**

News releases or contact with media representatives pertaining to this RFP or concerning any Offeror's proposal shall NOT be made prior to execution of the contract without prior written approval by the State.

#### **15. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION –**

- 1.15.1 By submission of a proposal each Offeror certifies, and in the case of a joint proposal each party thereto certifies, as to its own organization, that in connection with this procurement:
  - (a) The prices in the proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Offeror or with any competitor, other than a joint Offeror;
  - (b) Unless otherwise required by law, the prices which have been quoted in the proposal have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, directly or indirectly to any other Offeror or to any competitor; and

- (c) No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

1.15.2 Each person signing the Request for Proposals Signature Page of the proposal certifies that:

- (a) She/he is the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein and that she/he has not participated, and will not participate, in any action contrary to (1.15.1)(a) through (1.15.1)(c) above; or
- (b) She/he is not the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein but that she/he has been authorized in writing to act as agent for the person(s) responsible for such decision in certifying that such persons have not participated, and will not participate, in any action contrary to (1.15.1)(a) through (1)(c) above, and as their agent does hereby so certify; and she/he has not participated, and will not participate, in any action contrary to (1.15.1)(a) through (1.15.1)(c) above.

1.15.3 A proposal will not be considered for award where (1.15.1)(a), (1.15.1)(c), or (1.15.2) above has been deleted or modified. Where (1.15.1)(b) above has been deleted or modified, the proposal will not be considered for award unless the Offeror furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the head of the agency, or her/his designee, determines that such disclosure was not made for the purpose of restricting competition.

#### **16. PROPRIETARY/CONFIDENTIAL INFORMATION**

Any restrictions on the use or inspection of material contained within the proposal shall be clearly stated in the proposal itself; written requests for confidentiality of all or part of the proposal shall be submitted by the Offeror with its proposal. The Offeror must state specifically what elements of the proposal are to be considered confidential/proprietary.

Confidential/Proprietary information must be readily identified, marked and separated/packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable. Neither a proposal, in its entirety, nor proposal price and/or rate information will be considered confidential and proprietary. Any information that will be included in any resulting contract cannot be considered confidential.

The Governor's Office of Information Technology, Procurement Director and or delegate will make a written determination as to the apparent validity of any written request for confidentiality. In the event OIT does not concur with the Offeror's request for confidentiality, a written determination will be sent to the Offeror. If the request is denied, the Offeror will have an opportunity to withdraw its entire proposal, or remove the confidential and or proprietary restrictions. Ref. Section 24-72-200.1 et. seq., Colorado Revised Statutes (C.R.S.) as amended, the Colorado Open Records Act (CORA).

#### **17. RFP RESPONSE MATERIAL OWNERSHIP**

All material submitted regarding this RFP becomes the property of the State of Colorado. As such, the State of Colorado may retain or dispose of all copies as is lawfully deemed appropriate. Any person may review proposals after the "Notice of Intent to Make an Award" letter has been issued, subject to the terms of C.R.S. Title 24, Article 72, Part 2 as amended. The State of Colorado has the right to use any or all information/material presented in reply to the RFP, subject to limitations outlined in Section 1.16 - Proprietary/Confidential Information. Offeror expressly agrees that the State of Colorado may use the materials for all lawful State purposes, including the right to reproduce copies of the material submitted for

purposes of evaluation, and to make the information available to the public in accordance with the provisions of CORA.

#### **18. ACCEPTANCE OF RFP TERMS**

A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated by the autographic signature of the Offeror or an officer of the Offeror, legally authorized to execute contractual obligations. It is assumed by the Offeror's response that it acknowledges all terms and conditions of this invitation for an offer. An Offeror shall identify clearly and thoroughly any variations between its proposal and the State's RFP. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

#### **19. PROPOSAL CONTENT ACCEPTANCE**

The contents of the proposal (including persons specified) of the successful Offeror will become contractual obligations of the Offeror if a contract ensues. Failure of the successful Offeror to accept these obligations in a resulting contract may result in cancellation of the award and such Offeror may be removed from future solicitations.

#### **20. CONTRACTUAL OBLIGATIONS OF RFP DOCUMENTS**

The contents of the proposal and the terms of this RFP will become contractual obligations of the successful Offeror(s). This RFP consists of all documents listed under the Table of Contents and are hereby referenced and incorporated herein. "The State of Colorado Solicitation Instructions and Terms and Conditions" linked to the BIDS Notice on the website govern, except as modified or supplemented within the RFP. The final contract shall provide the order of precedence of all related documents, typically in the following order: Colorado Special Provisions (always takes precedence), contract, exhibits, RFP and Offeror's response.

In responding to this RFP, Offerors agreeing to abide by the requirements of this RFP are also agreeing to abide by all terms and conditions contained herein, so Offerors should identify or seek to clarify any problems with contract language or any other document contained within this RFP packet through their written inquiries about the RFP or within their proposal. Any proposed changes or objections to the contract language or other documents must be submitted as a part of the Offeror's proposal. Each change or exception shall be presented in the form of proposed alternative or substitute language. General objections, to be negotiated subsequent to the award, will not be accepted. Exceptions to the State of Colorado Special Provisions, attached to the contract, will not be accepted. Failure of the successful Offeror(s) to accept these obligations may result in cancellation of the award.

#### **21. CONTRACT**

Except as modified herein, the Model Contract included in this RFP shall govern this procurement and are hereby incorporated by reference.

##### **1. Legislative Changes**

The State of Colorado reserves the right to amend the contract in response to legislative changes.

##### **2. Order of Precedence**

In the event of any conflict or inconsistency between terms of this RFP and the Offeror's proposal, such conflict or inconsistency shall be resolved, first, by giving effect to the Colorado Special Provisions, contract, exhibits, RFP, Offeror's response.



### 3. Venue

The parties agree that venue for any action related to performance of the contract shall be in the City and County of Denver, Colorado.

### **22. OFFEROR PROPOSED TERMS AND CONDITIONS**

Except as specified in the Offeror's proposal, the submission of the Offeror's proposal will indicate its acceptance of the terms and conditions of this RFP. Offerors must disclose in their proposals terms and conditions or required clarifications of terms and conditions consistent with these instructions. The State reserves the right to clarify terms and conditions not having an appreciable effect on quality, price/cost risk or delivery schedule during post-award formalization of the contract.

### **23. STATE OWNERSHIP OF CONTRACT PRODUCTS**

All products produced in response to the contract resulting from this RFP will be the sole property of the State of Colorado. Any exceptions must be outlined in detail. Exceptions may serve as cause for rejection of the proposal.

### **24. PROPOSAL PRICING**

Estimated proposal prices are not acceptable. Offers submitted must include all related costs (e.g. hardware, software, licensing, surcharges, etc.). Any costs not included as part of the offer will be disallowed. Pricing must be in U.S. funds.

### **25. CONTRACT TERM**

This RFP may result in a multiple year IDIQ contract(s); estimated term stated in the Schedule of Activities and Section 2., "Background and Overview". The initial contract(s) will be effective upon approval by the State Controller or designee. The contract performance contemplated herein shall commence as upon the effective date of the resulting contract(s) and shall be undertaken and performed in the sequence and manner set forth therein. The State reserves the right to include additional projects mentioned in this solicitation or of a related nature, as funding becomes available, with the use of IDIQs or amendment. OIT intends to establish a five year contract which has the ability to add new projects in years 3, 4 and 5 which would extend the agreement for up to another five years. The contractual term would be a term not exceeding ten (10) years in total. With the understanding that no new work will be assigned to the successful Offeror(s) after the five-year period but that the contract may extend for up to 10 years to assure that all work begun during the contract is completed.

### **26. LATE PROPOSALS**

Late proposals will not be accepted. It is the sole responsibility of the Offeror to ensure that their proposal arrives in the designated office prior to the date and time as specified on BIDS.

### **27. REJECTION OF PROPOSALS**

OIT reserves the right to reject any or all proposals, to waive informalities and minor irregularities in proposals received, and to accept any portion of a proposal or all items proposed if deemed in the best interest of the State.

## **28. ESTIMATED QUANTITIES**

QUANTITIES, WHERE PROVIDED, ARE ESTIMATES ONLY, NO VOLUMES WILL BE GUARANTEED AS A PART OF BEING CHOSEN TO PROVIDE IMPLEMENTATION SERVICES AS A PART OF THIS RFP, OR ANY RESULTING TASK ORDERS.

## **29. NUMBER OF AWARDS**

The State intends to award one or more Model Contract as a result of this RFP.

## **30. AGREEMENT EXECUTION**

Timely execution of the Model Contract is of utmost importance. The State will attempt to work with the awarded Offeror to enter into a contract. The State reserves the right to cancel the award and contract negotiations at any time, and award the selection or selections to other successful Offeror(s) if doing so is determined to be in the best interest of the State. Upon execution of the Model Contract(s), an OIT Contract Administrator shall conduct a review of the contract requirements with key personnel of the State and Awarded Offeror(s). The purpose of the meeting is for all working parties to gain a better knowledge of contract requirements, have questions answered, and conduct a needs assessment so that transition to performance will commence timely and smoothly. This contract review meeting will be at the Offeror's expense.

## **31. INCURRING COSTS**

The State of Colorado is not liable for any costs incurred by Offerors prior to issuance of a legally executed contract. No property interest of any nature shall accrue until a contract is awarded and signed by all concerned parties and approved by the State Controller.

## **32. TAXES**

The State of Colorado, as purchaser, is exempt from all federal excise taxes under Chapter 32 of the Internal Revenue Code (Registration No. 84-730123K) and from all state and local government use taxes C.R.S. 39-26-114(a). The State's Colorado State and Local Sales Tax Exemption Number is 98-02565. Offerors are hereby notified that when materials are purchased in certain political sub-divisions (for example, City and County of Denver) the seller of such materials may be required to pay sales tax even though the ultimate product or service is provided to the State. This sales tax will not be reimbursed by the State.

## **33. INSURANCE**

The Awarded Offeror(s) shall obtain, and maintain at all times during the term of the contract, insurance in the kinds and amounts outlined in the linked BIDS State of Colorado Solicitation Instructions/Terms and Conditions and the attached Model Contract.

## **34. CYBER SECURITY**

The awarded Offeror(s) are required by OIT to comply with the State of Colorado Cyber Security Policies: [www.colorado.gov/cs/Satellite/Cyber/CISO/1167928186414](http://www.colorado.gov/cs/Satellite/Cyber/CISO/1167928186414). All responses to this solicitation will be evaluated, in part, according to the Offerors agreement with the Cyber Security Policies.

In addition, awarded Offerer(s) will be required to meet all the security requirements in the attached Model Contract. Indicate your acceptance of these requirements.

#### **34 A. CLOUD PROJECTS**

**Network Security.** Contractor agrees at all times to maintain network security that at a minimum includes network firewall provisioning, intrusion detection, and regular (two or more annually) third party vulnerability assessments. Likewise, Contractor agrees to maintain network security that conforms to generally recognized industry standards and best practices that Contractor then applies to its own network.

**Application Security.** Contractor agrees at all times to provide, maintain, and support the System and subsequent updates, upgrades, and bug fixes such that the System is, and remains secure from those vulnerabilities as described in: a) The Open Web Application Security Project's (OWASP) "Top Ten Project" – see <http://www.owasp.org>; or b) The CWE/SANS Top 25 Programming Errors – see <http://cwe.mitre.org/top25/> or <http://www.sans.org/top25-programming-errors/>; or c) Other generally recognized and comparable industry practices or standards.

**Data Security.** Contractor agrees to preserve the confidentiality; integrity and accessibility of State data with administrative, technical, and physical measures that conform to generally recognized industry standards and best practices that Contractor then applies to its own processing environment. Maintenance of a secure processing environment includes but is not limited to the timely application of patches, fixes, and updates to operating systems and applications as provided by Contractor. All State Confidential Information and State data of any kind shall be stored, processed, or transferred only in or to facilities located within the United States.

#### **35. TELEGRAPHIC/ELECTRONIC RESPONSES**

Telegraphic or electronic bids (Fax, Western Union, Telex, e-mail, etc.) cannot be accepted as a sealed proposal. Offerors are urged to read the solicitation document thoroughly before submitting a proposal.

#### **36. ADMINISTRATIVE REVIEW FACTORS – PASS/FAIL**

Offerors must demonstrate in writing their ability and willingness to comply with the mandatory minimum requirements found in Section 3 - Proposal Requirements of this RFP, as applicable, to be considered responsive to this RFP. These items are judged on a pass or fail basis and must be satisfied in their entirety in order for the Offeror's response to be considered for further review by the Evaluation Committee.

#### **37. COOPERATIVE AGREEMENTS**

Pursuant to 24-37.5-105(3)(i) CRS, the Governor's Office of Information Technology (OIT) will be the primary state party to the contract resulting from this procurement. All Executive Branch state agencies are included in this solicitation and any resulting award/contract. The Legislative and Judicial branches of State government are eligible to participate. OIT may extend the resulting award and contract to Institutions of Higher Education and Local Governments. Any contract resulting from this solicitation will be executed by OIT along with the successful Offeror.

#### **38. RFP CANCELLATION**

The State reserves the right to cancel this entire RFP or individual phases at any time, without penalty.

### **39. PROTESTED SOLICITATIONS AND AWARDS**

Any actual or prospective Offeror who is aggrieved in connection with the solicitation or award of a contract may protest to the Governor's Office of Information Technology (OIT), Procurement Director, 601 E 18<sup>th</sup> Ave., Suite 150, Denver, CO 80203. The protest must be submitted in writing within seven (7) working days after such aggrieved person knows, or should have known, of the facts giving rise thereto. Reference C.R.S., Title 24, Article 109.

### **40. AUDIT**

The State reserves the right to require that the successful Offeror(s) has a process audit conducted of its program at least once every three (3) years. If the successful Offeror(s) has not had such an audit prior to awarding of this contract, and the State requires one, then an audit must begin within six months of the award of this contract. The State reserves the right to approve the selected firm. A complete copy of the audit must be provided to the Governor's Office of Information Technology within five (5) working days of its completion. The Governor's Office of Information Technology will negotiate directly with the successful Offeror(s) regarding any exceptions or findings from the audit.

### **41. ORGANIZATIONAL CONFLICT OF INTEREST—REQUIREMENTS OF THIS SOLICITATION AND SUBSEQUENT CONTRACT**

Any business entity or person is prohibited from being awarded a contract if the business entity or person has an "Organizational Conflict of Interest" with regard to this solicitation and the resulting contract. No person or business entity who was engaged by the State to prepare the original RFP or has access prior to the solicitation to sensitive information related to this procurement process, (including, but not limited to requirements, statements of work, or evaluation criteria), will be eligible to directly or indirectly submit or participate, directly or indirectly in the submission of a proposal for this solicitation. The State considers such engagement or access to be an Organizational Conflict of Interest, which would cause such business entity or person to have an unfair competitive advantage.

If the State determines that an Organizational Conflict of Interest exists, the State, at its discretion, may cancel the contract award. In the event the successful Offeror was aware of an Organizational Conflict of Interest prior to the award of the contract and did not disclose the conflict to the procuring agency, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed by sub-Implementers in connection with the performance of the contract, with the terms "contract," "Implementers," and "contracting officer" modified appropriately to preserve the State's rights.

### **42. HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT OF 1996 (HIPAA)**

The Implementers warrants that it is familiar with the requirements of HIPAA, as amended by the Health Information Technology for Economic and Clinical Health Act (HITECH Act) of 2009, and accompanying regulations and will comply with all applicable HIPAA requirements in the course of this Contract. Implementer warrants that it will cooperate with the State in the course of performance of the Contract so that both the State and the Implementers will be in compliance with HIPAA.

If requested, the Implementers agrees to sign a “HIPAA Business Associate Addendum” and to abide by the statements addressing the creation, use and disclosure of confidential information, including information designated as protected health information and all other confidential or sensitive information as defined in policy.

#### **43. STATEWIDE CONTRACT MANAGEMENT SYSTEM**

For all contracts resulting from this solicitation, Implementers agrees to be governed, and to abide, by the provisions of CRS §24-102-205, §24-102-206, §24-103-601, §24-103.5-101 and §24-105-102 concerning the monitoring of vendor performance on state contracts and inclusion of contract performance information in a statewide contract management system. OIT shall evaluate, review and rate Implementers performance for all contracts resulting from this solicitation, for any contracted amount.

#### 44. GENERAL DEFINITIONS

**“Agile Enterprise Architecture”:** (AEA) The Chief Technology Officer’s group which establishes enterprise architecture standards for the State; and is responsible for final approval of Implementations to insure compliance with established standards as published by OIT.

**“Agency Task Order Sponsor”:** (ATOS) – The individual given the authority and responsibility for managing and approving the Task Order on behalf of the State Agency.

**“Agile Development Methodology” (Agile) -** Agile methodology is an alternative to traditional project management, typically used in software development. It helps teams respond to unpredictability through incremental, iterative work cadences, known as sprints. Agile methodologies are an alternative to waterfall, or traditional sequential development.

**“ARRA”:** The American Recovery and Reinvestment Act of 2009 (Public Law 111-5, enacted February 17, 2009), which is the federal stimulus package. ARRA requirements are included in this solicitation as some work may result using these funds.

**“Awarded Offeror/Vendor”:** Is the Offeror(s) whose proposal response the State deems to be most advantageous considering the factors set forth in this RFP.

**“Background Check”:** The State through the CWM will conduct the appropriate level of background check, for the positions requested which may include criminal, national, IRS, Revenue, polygraph.

**“BIDS”:** The State of Colorado's Bid Information and Distribution System Web site, located at: <https://www.gssa.state.co.us/VenSols>. All solicitations published by State agencies and institutions are published on BIDS. All bidders or Offerors wishing to respond to a solicitation (including this RFP) must be registered with BIDS (<https://www.gssa.state.co.us/VenRegister>).

**“Business Day”:** means 7:00 a.m. to 5:00 p.m., Mountain Time, Monday through Friday, excluding State holidays and State mandated office closures.

**“Cloud”:** a model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction. (<http://csrc.nist.gov/publications/nistpubs/800-145/SP800-145.pdf>)

**“Confidential Information”:** Implementers shall keep all State records and information confidential at all times and comply with all laws and regulations concerning confidentiality of information. Any request or demand by a third party for State records and information in the possession of Implementers shall be immediately forwarded to the State’s principal representative.

**“Contract”:** The result of the awarded proposal will be an OIT Enterprise Agreement, also called a Contract.

**“Implementer”:** means the Vendor selected to provide Implementation Services as a result of this RFP.

**“Implementers Intellectual Property”**: means any intellectual property that is owned by Implementers and contained in or necessary for the use of the Deliverables. Implementers Intellectual Property includes Documentation, and derivative works and compilations of any Implementers Intellectual Property.

**“CRS”**: Colorado Revised Statutes

**“Deliverables”**: means any items and materials, knowledge transfer, and all related legal rights to own or use such items and materials, delivered to Authorized Purchaser pursuant to an Order, as listed in the Task Order, including but not limited to the materials that Implementers delivered under an Order in the course of performance of the Work, whether owned or developed by Implementers, Implementers’ Staff or any other third party.

**“Delivery Schedule”**: means the schedule(s) for the performance of Work, as set forth in a TO that lists: (1) each Deliverable, including its measurable attributes; (2) payment schedule within each Deliverable, including milestone completion date; and (3) final delivery date for each Deliverable.

**“Documentation”**: means an operational description, in written format, of all Work to be performed under a TO, including documents that are Deliverables.

**“Documentation Standard”**: means the standard of quality and formatting of documents as stated in the IDIQ or Task Order. At a minimum all documentation created must meet or exceed applicable industry standards.

**“Enterprise Applications” of OIT: (EA)** – Responsible for designing, building, and deploying effective, efficient, and elegant solutions for our trusted partners through innovative technology. This team serves as the interface to the customer requirements through OIT Service Portfolios and Application Service teams.

**“EPPMO”**: means the Enterprise Project and Portfolio Management Office, which is a part of the Governor’s Office of Information Technology (OIT).

**“Legacy Applications and Systems”** – A Legacy System is an old method, technology, computer system or application program. The Legacy System may or may not remain in use following adaptation to the new Service Platform. Historic data associated with the Legacy System may, or may not, be converted into the new system format and may exist within the new system with the use of a customized interface if approved in advance by AEA. Preferably, data required by the new Platform will be migrated as a one-time event.

**“Office of Information Technology” (OIT)**: The Governor’s Office of Information Technology

**“Request for Proposal” (RFP)**: a procurement solicitation that seeks offers from organizations or individuals to perform the scope of work defined in the RFP, in accordance with the terms listed in the RFP. An RFP is issued with the intent of selecting the most advantageous proposal, making an award to that Offeror, and entering into a contract.

**“Service Providers”**: Business services involving cloud solutions by Salesforce.com, Google, and PERCEPTIVE providers.

**“Technical Writer”**: A professional writer who engages in technical writing and produces technical documentation and prepares information, which helps users. This documentation may include online help, user guides, white papers, design specifications, or system manuals.

**“Information Security Policies”**: means the security standards, definitions and policies endorsed by the State of Colorado, or if not addressed by the State, then at least known to be generally accepted practice in the industry, unless otherwise approved in writing by the State.

**“Information Technology” (IT)**: IT Professional Services or ITPS is defined in CRS 24-37.5-101 et seq.

**“Indefinite Demand & Indefinite Quantity” – IDIQ** – For this RFP, a proposal without any quantifiable demand or promise of any quantity of work for the selected Offerors. The objective of the IDIQ is to obtain qualified Implementers for the Service provides defined herein.

**“Key Persons”**: means Implementers’ Staff who will be principally responsible for managing the Services or for performance of Work under a Task Order and the satisfactory completion, delivery and acceptance of the related Deliverables.

**“NDA”** Non-disclosure Agreement - Implementers in certain areas will be required to sign this prior to assignment.

**“Offeror”**: Any organization or individual submitting a proposal in response to an RFP, or to this IDIQ. Sometimes used interchangeably with the term "Bidder, vendor, or Implementers."

**“PaaS”**: Platform as a Service - The capability provided to the consumer is to deploy onto the cloud infrastructure consumer-created or acquired applications created using programming languages, libraries, services, and tools supported by the provider. The consumer does not manage or control the underlying cloud infrastructure including network, servers, operating systems, or storage, but has control over the deployed applications and possibly configuration settings for the application-hosting environment. (<http://csrc.nist.gov/publications/nistpubs/800-145/SP800-145.pdf>)

**“SaaS”**: Software as a Service - The capability provided to the consumer is to use the provider’s applications running on a cloud infrastructure. The applications are accessible from various client devices through either a thin client interface, such as a web browser (e.g., web-based email), or a program interface. The consumer does not manage or control the underlying cloud infrastructure including network, servers, operating systems, storage, or even individual application capabilities, with the possible exception of limited user-specific application configuration settings. (<http://csrc.nist.gov/publications/nistpubs/800-145/SP800-145.pdf>)

**“SDLC”**: Software Development Life Cycle. ([http://en.wikipedia.org/wiki/Systems\\_development\\_life-cycle](http://en.wikipedia.org/wiki/Systems_development_life-cycle))



**“Solicitation”**: A document issued by the State of Colorado agency that requests competitive offers from organizations or individuals to sell the goods or services that are specified in the document. A solicitation typically results in an award of a contract or purchase order for the goods or services, based on an award methodology defined in the solicitation. Types of solicitations include: Requests for Proposals (RFPs), Invitation for Bids (IFBs) and Documented Quotes (DQs).

**“State”**: means the State of Colorado.

**“Statement of Work”**: means the components of a TO that include but are not limited to an introduction, project objectives, definitions, detailed tasks (and subtasks if needed), measurable Deliverables that correlate with tasks, acceptance criteria, delivery and payment schedule. Sometimes used interchangeably with Task Order.

**“Sub-Implementers”**: means independent Implementers or sub-Implementers that works for the Implementer.

**“Timeline”**: A document that details dates and targets for achieving Task Order Deliverables, goals, or requirements.

**“Task Order” (TO)**: Includes, but are not limited to, an introduction, project objectives, definitions, detailed tasks (and subtasks if needed), measurable Deliverables that correlate with tasks, acceptance criteria, delivery and payment schedule. Sometimes used interchangeably with Statement of Work.

**“Vendor”**: Any organization or individual that seeks to provide, or is already providing, goods or services

## **2. Overview and Background**

### **2.1 OVERVIEW**

The State of Colorado’s Governor’s Office of Information Technology (OIT) seeks proposals to identify Implementation Services (“Implementers”) for business services involving cloud solutions by Salesforce.com, Google, and Perceptive Software (Perceptive), and other emerging technologies (including but not limited to consulting services associated with Enterprise, Business, and Solutions architecture for the State) and approved by OIT, collectively the “Service Providers”. OIT will act as an agent for the State to solicit, select, contract, and approve the work of Implementers who will provide implementation services throughout the State using solutions provided by these Service Providers. These implementation services are offered to any State Agency implementing projects using the cloud based solutions provided by the Service Providers. Implementation of Services and Solutions required by State Agencies can be quite diverse and may include solutions from one or more of the Service Providers. The industry standards, as well as the standards established by OIT through its Strategic Architecture Group for the Enterprise (AEA), will depend on the specific business case requirements of each project. For this solicitation, Implementers will have the opportunity to describe the core competencies they have acquired to perform the required implementations, the level of staff experience, their overall approach implementing cloud services, document specific certifications associated with the Service Providers, and any other specific skills they may bring to the State to mitigate project risk.

State Roles:

Agency - Entity that sponsors and funds the project.

Agency Task Order Sponsor (ATOS) – Authorized by the Agency to prepare and approve Task Order; and with OIT, selects Implementer to perform work based on authority and responsibility. Approves the payment for the Task Order based on accomplishment of deliverables.

EPPMO - Projects, which include any IT component, independent of the size, are required to inform and work with the Enterprise Project and Portfolio Management Office (EPPMO), ensuring internal processes are followed in accordance with HB12-1288. Controls include but are not limited to standard scaling of the projects before commencement, creation of Architectural, Security and Risk assessments, detailed budget, and IV&V plan for major projects, management of projects utilizing OIT centralized repository of information for Project Management and reporting, participation for Executive Governance Committee when requested by the EPPMO. Nomination of PMP certified project managers to lead projects that represent high level of risk to the State of Colorado considering Architectural, Security results or if a project have rated Major as outcome of the Project Assessment and Risk scaling form.

OIT Procurement – Responsible for solicitation, negotiation, contract award, and management of IDIQ contracts and TO.

Agile Enterprise Architecture (AEA) - The Chief Technology Officer's group, which establishes enterprise architecture standards for the State; and is responsible for final approval of Implementations to insure compliance with established standards as published by OIT.

Enterprise Applications of OIT (EA) – Responsible for designing, building, and deploying effective, efficient, and elegant solutions for our trusted partners through innovative technology. This team serves as the interface to the customer requirements through OIT Service Portfolios and Application Service teams.

In Colorado's governing statutes, "State Agency" means all of the departments, divisions, commissions, boards, bureaus, and institutions in the executive branch of the state government. "State agency" does not include the legislative or judicial department, the department of law, the department of state, the department of treasury, or state-supported institutions of higher education. However, through the use of cooperative agreements, the following organizations will be able to request Implementation services from vendors selected as a result of this RFP.

- Department of Agriculture
- Department of Corrections
- Department of Education
- Department of Health Care Policy and Financing
- Department of Human Services
- Department of Labor and Employment
- Department of Local Affairs
- Department of Military and Veterans Affairs
- Department of Natural Resources
- Department of Personnel and Administration
- Department of Public Health and Environment,
- Department of Public Safety
- Department of Regulatory Agencies
- Department of Revenue
- Secretary of State
- Department of Transportation
- Department of Treasury
- Governor's Office of Information Technology
- Will be made available to the Judicial and Legislative branch

## 2.2 INTRODUCTION

This is an Indefinite Demand, Indefinite Quantity (IDIQ) procurement for a series of Task Orders (TO).

The resultant Model Contract with Implementers will have a base period of \*five years with five consecutive 1-year renewal options. OIT may terminate the procurement at any time; and there is no guarantee of any volume or services associated with this IDIQ or subsequent contracts. Implementers will only perform Implementation Services when awarded a Task Order as described herein, and there is no guarantee of any volume or services for the Task Orders associated with this IDIQ or subsequent contracts.

This IDIQ involves development and support of existing Portal and Content Management System (CMS) technologies and solutions for OIT internal and external website (development, publishing, staging and production environments) and the development and support of collaboration tools, services, and applications for the State IT enterprise.

### **2.3 OBJECTIVE**

The purpose of this IDIQ is to continue implementation of selected industry best practices and collaborative technologies to upgrade the functionality and usability of The Governor’s Office of Information Technology (OIT) development infrastructure and environment, including: OIT’s internal and external Portal and CMS, database and application processes using Java-based Open Source products and advanced portlet technologies, approved collaborative tools, applications and services with backend use of, Google app engine, Enterprise Content Management (Perceptive), Salesforce cloud based databases and/or other substitute architectures as needed. Included is the continued effort and support required for any recommended updates and on-going modifications to those systems during and after any required hardware and software transition phases.

OIT’s objective is to continue to improve, incorporate and maintain existing systems and provide the best possible content management/publishing architecture strategies available to meet the needs and requirements of the OIT’s external and internal Portal and Publishing user base. An outcome of this IDIQ is to provide the State with a comprehensive, customer-oriented, easy to navigate Portal that follows industry best practices incorporating personalized and collaborative site features as designated and approved within the project plan during implementation of any changes in Citizen Engagement Platform as a Service (CEPaaS), the OIT.gov and Portal websites.

OIT anticipates multiple Implementers will be selected through this IDIQ. Selection will be based on competency, experience, stability, specialties, cost, and a variety of other factors necessary to provide the best solutions within the Enterprise Solution. The Model Contract will include an hourly rate for specific services associated with the Implementation Services. Selected Implementers may be asked to participate in a “Best Practices” user group managed by AEA to insure the continual implementation of state-of-the-art solutions.

In meeting the above objectives, OIT expects the Implementers to do the following items:

- Develop and implement any prioritized items deemed relevant and important for the continuing security and functionality of the Portal websites, CMS, dashboards, collaboration tools, and applications.
- Fully document and explain content management, system architecture, site design and development environments to OIT personnel as required.
- Plan site launch and perform unit and system integration testing. Conduct final testing and deployment, configuration and performance tuning. Execute a load-testing solution and the User Acceptance Test Plan that proves functionality and response time requirements consistent with user expectation.
- Provide post-launch support to CIO and other OIT users as required.

\*Pending Approval by the State Purchasing Director

- Train and assist designated individuals during OIT approved training sessions in the Content Management System (CMS), as required.

The Implementers shall also plan, modify and implement any necessary changes required on the Development, Publishing, Staging, Production, and Continuity of Operations Plan (COOP) environments to support any recommended content architectural changes, enhancements and fix user-identified problems.

Additionally, skill and knowledge is required in an effort to design, develop, implement, integrate, advise, document and support workflow processing, crowd sourcing, Wiki and Blog software, Salesforce, Google

Apps, Perceptive, and database design and administration, Dashboard technologies, web page and web 2.0 applications/Java portlets in cooperation with other services and Enterprise Web Solutions.

## **2.4 Background**

The objectives of AEA, are to support innovations which improve productivity, enhance public services; reduce State spending through technology; and encourage standards to support sharing of information within government, business, and for the public.

In order to further achieve these objectives, OIT has currently undergone a complete email infrastructure conversion to Google Gmail. Additionally, on the immediate horizon are varying levels of implementation and integration of other Google applications such as: Documents, Forms, Calendar, Sites, Google App Engine, etc., Salesforce, and Perceptive solutions into the OIT suite of application development. This transformation into a Cloud-based infrastructure for various software and hardware implementations within OIT will continue to require a robust set of development and task management skills for this task.

Additionally, OIT continues to convert hundreds of “Legacy Applications and Systems” onto new service platforms suitable for their continued use throughout the State. In support of that effort, a collection of skilled software application developers in Salesforce (Apex), Perceptive, and Google App Engine (Python) to convert these existing applications, and any other applications as directed, is required.

Likewise, analysis of the application requirements, business model for each particular application and service and its integration into the existing infrastructure and functional specifications for these soon-to-be converted applications will need to be reviewed and prioritized prior to development, implementation and deployment.

Furthermore, the “Agile” project management methodology is in use at OIT for software and service development. Agile development is a way of managing software development and fundamentally differs from more a traditional waterfall approach to software development. Key principles include active user involvement, decisions based on team empowerment, requirement evolution within a fixed time scale and are captured at a high level; development occurs in small incremental releases and focuses on frequent delivery of product. Application testing is early and often throughout project life cycle. Success is achieved though a collaborative and cooperative approach between all stakeholders. The Implementers shall employ the Agile development methodology on work accomplished under this IDIQ.

The Implementers shall interface with the appropriate Enterprise Applications personnel (Application Service Manager or Business Process Manager) to engage with the customer and to hand off appropriately to the application service teams.

The Implementers shall provide development and analysis support utilizing a structured project management methodology as required by EPPMO. Projects, which include any IT component, independent of the size, are required to inform and work with the Enterprise Project and Portfolio office ensuring internal processes are being followed in accordance with HB12-1288 processes. Controls include but are not limited to standard scaling of the projects before commencement, creation of Architectural, Security and Risk assessments, detailed budget, and IV&V plan for major projects, management of projects utilizing OIT centralized repository of information for Project Management and reporting, participation for Executive Governance Committee when requested by the Enterprise Portfolio Office. Nomination of PMP certified project managers to lead projects that represent high level of risk to the State of Colorado considering Architectural, Security results or if a project have rated Major as outcome of the Project Assessment and Risk scaling form.

## **2.5 Technical Expertise**

A general understanding and technical expertise in the integration of backend information sources (e.g. Salesforce, databases, Google App Engine, Google Calendars, spreadsheets, documents, etc.) using current java portlet technologies is required.

The Implementers will have the technical expertise to do the following actions:

- 1) Document all database scripts, replication processes, backup processes and database schema changes clearly and consistently. These skills should include expertise in updating highly-technical documentation - including, but not limited to: a detailed summary and outline of our post migration design structure, deployment details, online help, technical user guide, listing of individual technical staff members and areas of cross-trained responsibilities on systems and code design specifications and other documents and thus providing a well-documented library of reference material that will provide our on-site contracting staff and in-house employees information to more efficiently perform their duties.
- 2) Design, develop, implement, integrate, advise, document and support workflow processing, Wiki, and Blog software, Web Trends, mobile and social analytics software, Force blogs and wikis, crowd sourcing, collaboration, dashboard integrations, Google Calendars, spreadsheet data, documents in web pages, mobile device applications and web 2.0 applications/Java portlets as needed.
- 3) Continue application development, configuration and maintenance efforts to provide a dynamic, collaborative environment for the State's customer base through the use of appropriate industry-standard java portlet and web 2.0 technologies/tools such as, but not limited to, the following: JavaScript and/or java server pages (JSP's), PHP, HTML5, DHTML, XML, AJAX, CSS, APEX, Python, and object oriented code for OIT applications
- 4) Transfer knowledge about content management, system architecture, site design, and Portal website environments to OIT personnel and Agency staff. Cross-train individual technical staff members on multiple areas of expertise between systems and code bases. Assist in the development of procedures and project timelines to describe how the sites will "go live".

- 5) Maintain a comprehensive project plan, Software Development Life Cycle (SDLC) implementation schedule and track technical tasks' lifecycle from initial identification through completion using appropriate best practices and the Agile project management methodology for software development as directed.
- 6) Produce, as needed, critical and detailed system architectural documentation and functional specifications by a skilled Technical Writer for newly deployed services and rolled out into Production mode.
- 7) Provide for the continued monitoring of processes and appropriate alert notifications using monitoring software pertaining to software and hardware failures affecting the operation of the OIT infrastructure. Install and set up any approved and applicable software necessary to maintain and monitor the CMS, Portal, and infrastructures. In doing so, the Implementers shall develop and execute procedures and methods to monitor site operations to achieve optimization, continuous system availability, provide analysis, application development, operations and maintenance, support services to ensure that all users with access to databases and web sites developed within the team are able to enter data, route and print when necessary.
- 8) Designate and recommend, when appropriate, the use of applicable software services or hardware that might serve towards the goal of maintaining, upgrading, and/or refining OIT systems.
- 9) Provide analysis, application development, operations and maintenance, support services to ensure that all users with access to databases and web sites developed within the team are able to enter data, route and print, when necessary.
- 10) Conduct unit and system integration testing to prove functionality and identify any existing problems. Conduct performance tuning and load testing/balancing scenarios to optimize performance of systems;
- 11) General administration of user accounts and groups.
- 12) Setup, develop, maintain and test case scenarios on code changes to the Portal and CMS with appropriate professional software or other software as applicable and approved by OIT's Enterprise Architecture group.
- 13) Provide assistance, as needed, in general training/advising/instructing customer base on existing applications.
- 14) Articulate technical ideas and proposals in a clear, concise manner to non-technical savvy customers during meetings and work group sessions and demonstrate an ability to communicate effectively in meetings and provide clear, concise and understandable information to varying levels of technical expertise depending upon audience.
- 15) Provide business process identification, creation, standardization and implementation support as appropriate;
- 16) Provide recommendations, requirements gathering/identification and guidance to customers on new and emerging tasks and requirements as they develop and advise customers on solution models and outcomes based on Agile Development methodologies.

17) Provide development, design, migration, platform transition support, deployment, post-launch implementation and end-user support for OIT infrastructures; support existing OIT database interfaces, definitions, and operating systems; support existing Force cloud based database implementations and processes supporting OIT infrastructures.

## **2.6 TASK DESCRIPTIONS**

### **2.6.1 TECHNICAL MANAGEMENT**

The Implementers will be responsible for providing technical management support to ensure that all required personnel, and administrative, financial, and managerial resources are available to support this IDIQ and the resulting TOs. The Implementers must be able to establish and maintain a comprehensive project plan, implementation schedule and track technical tasks' lifecycle from initial identification through completion using appropriate best practices and the Agile project management methodology for development as directed. Implementers must identify and mitigate high-level risks and issues as these arise. The technical management of the TO shall generate procedures and timelines to accommodate future scheduling and resource allocation for implementation of proposed applications within the context of broader OIT initiatives and proposed changes to the existing and new Portal, CMS infrastructures, and Platforms. OIT does not envision this as a full-time project manager position in support of this task but does expect there to be a technical lead(s) to manage the overall task.

### **2.6.2 PORTAL AND CMS DEVELOPMENT/DATABASE SUPPORT**

The Implementers shall continue enhancement of existing website Portal, Content Management System (CMS) and database architectures by assisting in the on-going development, conversion and implementation using Java and web 2.0 portlet technologies in support of future business process needs. In addition to supporting the existing architectures, OIT expects the Implementers to:

- 1) Provide expert advice to OIT regarding additional techniques and/or requirements for delivering dynamic, personalization and collaborative features for the Portal websites.
- 2) Identify, design, implement and maintain any known bugs/enhancements in OIT's Portal and CMS environments in a Tracking issues database to act upon after further examination and prioritization by ATOS and CIO staff.
- 3) Design, develop and plan for the implementation and roll-out of a fully-functional website utilizing the desired collaboration features using pre-approved, emerging OIT software to provide a customized and enhanced user experience using the latest Portlet technologies and capabilities.
- 4) Propose, implement and develop a software method of monitoring the existing and new Portal and CMS site operations to achieve optimization and minimize site downtime/inaccessibility.
- 5) Propose and implement high availability solutions and software, as required, for site operations to optimize site performance.



- 6) Develop and execute the User Acceptance Test Plan, conduct final unit, system and integration testing and deployment verifying site functionality after modifications, upgrades and conversions to the existing Portal and CMS websites.
- 7) Provide assistance and post-launch support for users of the newly-deployed systems and basic Tier I assistance and help for new applications built on these platforms.
- 8) Evaluate new releases and capabilities of databases, and third party products to ensure that the site is running the products that are most appropriate.
- 9) Database support (DBA) is responsible for working with application developers, systems administrators and management to ensure that any new product or release upgrade takes place with minimal impact on OIT's website infrastructures. DBA will provide technical support and work with the application development teams and systems administrators as needed to create and delete tables, perform queries, generate reports, etc. using SQL, SQL Plus, TOAD and whatever other tools are needed.
- 10) Install, create, configure, and maintain existing databases required for development, testing, and production usage. Perform capacity planning and ongoing tuning of the database instances required to create and maintain the databases.
- 11) Administer roles-based user access and groups in applications and apply security patches and software updates and infrastructure support as necessary.

### **2.6.3 APPLICATION DEVELOPMENT SUPPORT**

As OIT continues to convert hundreds of Legacy Applications and Systems onto new service platforms suitable for their continued use throughout the State agencies, support is required to do the following:

- 1) Create, implement, design and manage dashboard implementations, crowd sourcing, Wiki sites using Salesforce blogs and wikis, mobile and social analytics implementations or other OIT-approved architectures, as directed.
- 2) Develop applications, web pages and/or web service/portlet interfaces in Open Source Java-based applications, Salesforce.com and/or Python software to be accessed through OIT's intranet, and internet web pages, OIT.gov, CEPaaS, or other browser-based interface.
- 3) Design, develop, test and deploy mobile device applications (including, but not limited to iPhone and Android devices) to compliment website functionality.
- 4) Support the development and implementation for mobile applications.
- 5) Migrate and/or archive any old Legacy databases and applications that will no longer be supported onto more suitable, long-term architectures, as required.
- 6) Administer roles-based user access and groups in applications as necessary.
- 7) Refine performance metrics, business objectives, and performance reporting from within Salesforce, Google Apps, and Perceptive solutions.

- 8) Provide data mapping between Salesforce and other OIT systems to allow for external data to be effectively and appropriately integrated within Salesforce.
- 9) Provide Data Dictionary support in order to effectively represent Salesforce data where it resides in the Business Objects Data Warehouse.
- 10) Integration of business intelligence reporting with new software services and applications used in support of new and existing business processes.
- 11) Implementation of Salesforce Knowledge Management and Customer Portal capabilities as needed.
- 12) Provide support for mobile usage and integration of State email system/service provider of new software applications as required.
- 13) Technical modification of Salesforce, Perceptive, and Google platforms and software services to support new and existing business processes.

#### **2.6.4 QUALITY ASSURANCE/CUSTOMER SUPPORT**

In support of all tasks, the Implementers shall perform quality assurance on all deliverables. The Implementers are expected to provide customer support and assist with training, as required. At a minimum, the Implementers are expected to:

- 1) Lead user group discussions, extract technical requirements, articulate technical ideas and proposals in a clear, concise manner to non-technical savvy customers during meetings and work group sessions. Provide business process identification, creation, standardization and implementation support. Provide requirements identification, creation and technical implementation support. Provide external system integration support for business intelligence and reporting tools, customer facing transactional websites and internal collaboration and project management tools. Assist with requirements gathering, requirements identification and requirements segmentation based on Agile Development methodology.
- 2) Transfer knowledge about content management, system architecture, site design, and development environments to OIT personnel as required and cross-train techs as applicable and document. Included in this documentation should be the current configuration regarding Oracle replication, schema account information, database objects, and descriptions of script modifications and locations of scripts. The documentation shall also include the client and server configuration for failover and the methods and procedures used for the replication of tables with long data types. For applications, documentation should include the current configuration and functional application specifications.
- 3) Work with all OIT offices and contract groups on technical and business process issues as they relate to Salesforce, Google, and Perceptive system use. Specifically, engage Enterprise Applications to ensure successful integration into the overall OIT service portfolios, application suite, and service delivery processes. Additionally, engage EPPMO as required to insure compliance with all state requirements on Project management and administration.
- 4) Provide support for business process standardization and creation as it relates to customer support, customer outreach, customer sales and internal communication and collaboration.
- 5) Assist with document management and categorization, ongoing user communications and outreach programs as needed.

6) Work to establish User Adoption plans and strategies and assist in the execution of these plans and strategies.

7) Provide full documentation support to include, but not limited to:

- Quick Reference Guides
- System User Guides
- Onboarding Guides
- Process Workflows
- Recorded Screencast Guides
- Project Management Documentation
- Meeting Notes
- Release Notes

Documentation is to be delivered in electronic format as appropriate and specified by OIT from time to time.

### **2.6.5 Transition Support**

Upon the completion or termination of any TO under this IDIQ, the Implementers may be required to transition work to another Implementer. The incumbent Implementer shall provide appropriate phase-out or transfer activities and create any processes necessary for transition of all work to the subsequent Implementers. Each Implementer shall provide for a smooth transition and provide phase-out support activities that may include, but are not limited to:

- Coordinate with follow-on Implementers on phase out activities;
- Update, validate, and transfer all supporting documentation;
- Participate in phase-out transition activities such as planning sessions, training, and facilitation of information sharing;

This subtask will be treated as an additional TO, and will be utilized at the discretion of OIT. In the event this option is exercised, OIT will provide notice to the Implementers and ask for a detailed price proposal based on the labor categories and prices in effect at the time of the request.

## **2.7 DISASTER RECOVERY**

In the event of an emergency or disaster, the Implementers shall participate in the OIT Continuity of Operations Plan (COOP) to work cooperatively with the State in a way that will enable the State continue to perform essential operations under difficult conditions. This participation may involve traveling to the designated alternate location and providing technical assistance as necessary.

## **2.8 INSPECTIONS AND ACCEPTANCE**

OIT will review and verify that all deliverables associated with the IDIQ and each TO fulfill the requirements and standards stated in the IDIQ and TO. All deliverables will be inspected for content, completeness, accuracy, adequacy, and conformance to the requirements (including any applicable standards), as specified in this IDIQ and TO. The government, through its authorized representative, has the right, at all reasonable times, to inspect, or otherwise evaluate the work performed, or being performed,

hereunder and will notify the Implementers of unsatisfactory performance. All inspections and evaluations will be performed in such a manner as will not unduly delay the work.

OIT will accept/reject the deliverables. OIT has the right to reject or require correction of any deficiency(s) found in any deliverable that is contrary to the information contained in the Implementers' accepted proposal as amended by the TO. The Implementers will be notified in writing by OIT of the specific reasons why the deliverable is being rejected. Deficiencies of a minor technical nature will be evaluated by the OIT to determine its significance, which could lead to rejection of deliverables.

OIT will have fourteen (14) workdays to complete the review of each deliverable and accept or reject the deliverable by giving written notice to the Implementer. When the government fails to complete the review within the review period, the deliverable will become acceptable by default, unless an extension of the review period is requested. In the event of rejection of any deliverable, the Implementers will be so notified in writing by OIT, giving the specific reason (s) for the rejection. The Implementers will have ten (10) work days to correct the rejected deliverable and return it to OIT.

## **2.9 OPTION TO EXTEND THE TERM OF THE CONTRACT**

(a) OIT may extend the term of this IDIQ contract by written notice to the Implementers within the final 30 days of each contract period; provided that OIT shall give the Implementers a preliminary written notice of its intent at least 60 days before the IDIQ contract expires. The preliminary notice does not commit OIT to the extension.

(b) If OIT exercises this option, the extended IDIQ contract shall be considered to include this option clause.

(c) Hourly rates agreed to, as a part of the Model Contract, will include an escalator clause effective at the start of the third year of the contract based on the initial effective date of the Model Contract. The escalator will be not to exceed rate of three percent contingent on approval by the State.

Some implementation will require staging over a number of years due to available funding or project complexity. The total duration of this IDIQ, including the exercise of any options under this clause, shall not exceed \*ten (10) years.

## **2.10 PLACE OF PERFORMANCE**

All work on this contract shall be performed at specific locations defined in each TO. The Implementers shall schedule work hours of all on-site personnel to ensure that State and OIT operational requirements are properly met. Implementers shall be available during non-business hours to handle emergencies, scheduled maintenance, upgrades or similar work. Work may be performed remotely as agreed to with ATOS and OIT in writing.

Normal business work hours are generally between 7:00am - 5:00pm, Monday through Friday inclusive, except State holidays.

\*Pending Approval by the State Purchasing Director

## **2.11 IMPLEMENTERS DESIGNATION OF PROPOSED KEY PERSONNEL**

The Implementers shall provide all management, administrative, clerical, and supervisory functions required for the effective and efficient performance of TOs authorized by this IDIQ. The Implementers are expected to ensure a stable workforce during the performance of any TO under this IDIQ. Personnel assigned to TOs under this IDIQ must be knowledgeable of and able to demonstrate their experience with all the necessary tasks identified. The Implementers shall designate individuals to work on this IDIQ and all individuals identified for this task will be considered key personnel by OIT.

If it becomes necessary to replace any key personnel, the Implementers shall notify OIT, in writing, of a proposed substitution of key personnel. This notification will be submitted at least thirty (30) calendar days in advance of the proposed substitution. All proposed substitutes should have qualifications equal to, or greater than, the person to be replaced. The Implementers shall, whenever possible, identify replacements sufficiently far enough in advance to permit the acceptable replacement to work alongside the person they are replacing for no less than 10 work days.

OIT will evaluate such requests and promptly notify the Implementers, in writing, of his/her approval or disapproval thereof. At the discretion of OIT, an interview with the proposed key individual may be required to verify that the proposed substitute has qualifications equal to, or greater than, the person to be replaced. OIT will notify the Implementers ten (10) business days in advance of the proposed substitution date if OIT chooses to conduct an interview to review the qualifications of the proposed individual.

## **2.12 OIT REQUESTED REPLACEMENT OF PERSONNEL**

OIT has the right to require removal of, or approval of, any Implementers personnel assigned to accomplish any TO under this IDIQ. Any personnel replacement will be reviewed by the OIT.

## **2.13 GOVERNMENT FURNISHED EQUIPMENT**

OIT will furnish the following resources:

- Conference room space for briefings and meetings based on availability. OIT could request the implementers to provide space as an option.
- Workspace for Implementers personnel equivalent to that furnished to the State staff; dependent upon availability.
- Use of State equipment necessary for Implementers personnel to complete the task(s) and deliverables. Equipment may include pagers, cell phones, desktop or laptop computers, and other miscellaneous equipment necessary to effect communications. All State furnished property will be issued upon receipt of the appropriate forms and property passes and will be returned to the issuing office upon termination of the task or the responsible Implementers personnel.

## 2.14 GOVERNMENT FURNISHED INFORMATION

Information - All unique information related to this requirement, which is necessary for Implementers performance, will be made available to the Implementers.

Documentation - All existing documentation, relevant to this task accomplishment, will be made available to the Implementers throughout the TOs awarded under this IDIQ. The Implementers will be required to prepare documentation in accordance with defined guidelines provided by OIT.

## 2.15 GENERAL COMPLIANCE REQUIREMENTS

All deliverables and work products covered under this IDIQ and any associated Task Orders become the property of OIT. The Implementers are responsible for adhering to all aspects of the Privacy Act and is prohibited from removing from the work site any programs documentation, or data without the knowledge and written approval of OIT.

## 2.16 CYBER SECURITY

The awarded Offeror(s) are required by OIT to comply with the State of Colorado Cyber Security Policies: [www.colorado.gov/cs/Satellite/Cyber/CISO/1167928186414](http://www.colorado.gov/cs/Satellite/Cyber/CISO/1167928186414). All responses to this solicitation will be evaluated, in part, according to the Offerors agreement with the Cyber Security Policies.

In addition, awarded Offeror(s) will be required to meet all the security requirements in the attached model contract. Indicate your acceptance of these requirements.

### 2.16.1 CLOUD PROJECTS

**Network Security.** Contractor agrees at all times to maintain network security that at a minimum includes network firewall provisioning, intrusion detection, and regular (two or more annually) third party vulnerability assessments. Likewise, Contractor agrees to maintain network security that conforms to generally recognized industry standards and best practices that Contractor then applies to its own network.

**Application Security.** Contractor agrees at all times to provide, maintain, and support the System and subsequent updates, upgrades, and bug fixes such that the System is, and remains secure from those vulnerabilities as described in: a) The Open Web Application Security Project's (OWASP) "Top Ten Project" – see <http://www.owasp.org>; or b) The CWE/SANS Top 25 Programming Errors – see <http://cwe.mitre.org/top25/> or <http://www.sans.org/top25-programming-errors/>; or c) Other generally recognized and comparable industry practices or standards.

**Data Security.** Contractor agrees to preserve the confidentiality; integrity and accessibility of State data with administrative, technical, and physical measures that conform to generally recognized industry standards and best practices that Contractor then applies to its own processing environment. Maintenance of a secure processing environment includes but is not limited to the timely application of patches, fixes, and updates to operating systems and applications as provided by Contractor.

All State Confidential Information and State data of any kind shall be stored, processed, or transferred only in or to facilities located within the United States.

## **2.16.2 CONFIDENTIALITY AND NONDISCLOSURE**

The preliminary and final deliverables and all associated working papers and other material deemed relevant by the agency that have been generated by the Implementers in the performance of this IDIQ and associated TO, are the property OIT and must be submitted to OIT at the conclusion of each TO.

The Implementers shall not release any information without the written consent of the OIT. Any request for information relating to the TO or IDIQ(s) that is presented to an Implementer must be submitted to the OIT for approval. Personnel working on any of the described tasks for any TO may, at OIT's request, be required to sign formal non-disclosure and/or conflict of interest agreements to guarantee the protection and integrity of government information and documents.

## **2.17 RESPONSIBILITY FOR THIRD PARTY CONTRACTORS ENGAGED BY IMPLEMENTERS**

Contractor shall include these terms, including this requirement, in any of its subcontracts or sub-grants in connection with Task Orders awarded through this RFP.

### **3. Scope of Work**

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#### **1. OVERVIEW**

Items in this Section are the minimum requirements, which must be met for an Offeror's proposal to be considered. The selected Offeror's may be asked to demonstrate capability for all or any number of the requirements identified in this Section.

#### **2. General**

The purpose of this RFP is to select multiple Contractors, which will be responsible for performing Implementation Services as described herein. No guarantees of quantity or volume of work is provided.

#### **3. Administrative Compliance**

As part of the response, the Offeror must acknowledge the ability to comply with the following administrative requirements listed below and these responses are mandatory:

##### **3.1.2.1 Location**

Implementation services must be performed according to Agency TOs. These TOs could be issued by any State Agency listed in Section 2.1 "OVERVIEW". OIT Executive Governance meetings will be held at 601 E. 18th Avenue, Denver, Colorado. Offeror's assigned on-site staff shall follow building security access procedures based upon State Agency specific guidelines and may be required to pass a background check.

##### **3.1.2.2 Security**

The Offeror and their assigned resource(s) must become familiar with and adhere to all Colorado Cyber Security Rules and Policies. The Colorado Cyber Security Rules and Policies are available at: <http://www.colorado.gov/cs/Satellite/Cyber/CISO/1167928186414>

##### **3.1.2.3 HIPPA Requirements**

Health Insurance Portability & Accountability Act of 1996 ("HIPAA") Federal law governing the privacy of certain health information requires a "Business Associate Contract" between the State and the Implementer. The successful Offeror shall sign a HIPAA Business Associate Addendum for HIPAA compliance. A copy of the Addendum can be found in Attachment D.



### **3.1.2.4 State Provided Workspace and Common Tools**

Agencies or OIT will provide necessary common work areas for Implementer activities as availability allows. Other standard tools consist of Google Apps, Salesforce Chatter, Microsoft Word, Excel, Access, PowerPoint, Project, VISIO, and such other tools as are approved by OIT. If an Offeror proposes to use tools, not currently in use by the State, these tools must be outlined in the response and associated costs documented in the TO.

#### **3.1.2.4.1 Legislative Requirements**

Implementation services must follow OIT lead to full specific requirements of HB-12-1288. Other Agencies may have specific compliance requirements that will be included in the individual Statement of Work.

*(Offeror should indicate understanding and agreement of the requirement above.)*

Offer Response

- 3.1.2.1
- 3.1.2.2
- 3.1.2.3
- 3.1.2.4
- 3.1.2.4.1

### **3.1.2.5 Legal Entity Type**

Offerors shall document in the response whether you are a partnership, a non-profit corporation, a Colorado corporation, a non-Colorado corporation, or some other business structure. If awarded non-Colorado corporations must register as a foreign corporation to conduct business in Colorado and appoint a resident agent. Indicate if your business is a foreign corporation, a limited liability partnership or a limited liability limited partnership. If Offeror is a Colorado company, you must state that you currently have a Certificate of Good Standing or Certificate of Existence to do business in Colorado. Proof of such certification must be provided upon award.

*(Offeror should indicate understanding and agreement of the requirement above.)*

Offeror Response:

- 3.1.2.5

### **3.1.3 Personnel Assignment**

In consideration of project continuity, staff assigned by the awarded Implementers shall not be replaced once the TO has been awarded without prior written authorization from the ATOS and OIT. In the unlikely event a replacement does become necessary, OIT reserves the right to renegotiate or reject suggested assigned replacements to ensure overall project continuity and quality. In addition, it is expected that the awarded Implementers will, in advance and at its own expense, transition the replacement. This includes “bringing the implementer resource up to speed” with the appropriate amount of time needed by the new consultant resource prior to billing OIT. This eliminates transition costs and minimizes transition obstacles. OIT has final approval for replacement personnel.

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:

3.1.3

### **3.1.4 OFFEROR EXPERIENCE AND CAPABILITY**

Offerors must provide the following information about their organization in order for OIT to evaluate an Offeror’s ability, stability, and strategic direction to support the requirements of this RFP. The State requires that an Offeror provide the information below:

1. Offeror background, and history;
2. The length of time the Offeror has been in business;
3. A brief description of Offeror’s organization and size;
4. Include address where assigned Personnel Resources, who will service this account, are located, Offeror headquarters, and any other branch offices that might be involved during this engagement;
5. Number of similar Implementation engagements over the last two years, including a description of the engagements;
6. Disclosure of all lawsuits that the Offeror has been involved in over the past three years relative to software performance, implementation services, support and maintenance, etc. and the outcome or disposition of each;
7. Disclosure of any lawsuit or litigation resulting from any job undertaken by the Offeror, or by its proposed Personnel Resources that is pending or has occurred within the last three (3) years. Include the resolution or disposition of any such lawsuit or litigation;
8. Type of skills or similar engagements you are currently working on;
9. Recruiting and hiring techniques to obtain personnel required for this IDIQ;
10. Include three (3) references from similar projects. Please note that OIT reserves the right to contact and evaluate information from the references provided by an Offeror to validate the Offeror’s experience.

*(Offeror should provide responses to the requirements above.)*

Offeror Response:

3.1.4

Q 1-10

### **3.1.5 Implementation Services and IDIQ/TO Process**

Upon completion of this solicitation, the OIT will create a pool of Implementers for Service Providers to the State. The State will create a TO process for Agencies to request Implementation Services. The process is described below and will be available at the time all Implementer contracts are completed.

When a need arises for Implementation services, the Agency will complete a Statement of Work (SOW) that includes a Business Case as well as project specific requirements. The Agency will initiate the COMPASS requisition and attach the SOW and start the Interagency Agreement (IA). The Procurement Officer will submit the TO to the pool of Implementers via email. All Implementers in the pool will have the ability to respond to the TO. OIT and the Agency Task Order Sponsor (ATOS) will evaluate, produce the TO deliverables, and award the work based upon the Implementers plan, competency, experience, stability, specialties, cost and such other factors necessary to provide the best solutions to implement the TO. The ATOS will prepare and send the COMPASS attachment, the IA with the dollar amount of the selected Implementer, so that OIT will establish spending authority.

Once the IA is approved, Procurement Manager will draft and route the TO based on the SOW, and vendor response to the Office of the State Controller (OSC). When the TO is approved and returned by OSC, Procurement Manager will notify the ATOS and Implementer and at that time, work on the TO can proceed.

All TO awards are final and not subject to appeal. The selected Implementer must complete the deliverables within the timeframe and budget specified within the TO.

The State reserves the right to reject any or all TO proposals, to waive any irregularity or informality in a TO proposal, and to accept or reject any item or combination of items, or TO proposals that do not contain all elements and information requested in the TO on behalf of the State. In certain circumstances OIT may bypass this process if it is determined to be an emergency or risk to the project.

#### **Invoices**

The ATOS, a representative of OIT/AEA, and a representative of the OIT EA team must approve all invoices. The approved invoice will be forwarded to the OIT Accounts payable staff.

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:

3.1.5

### **3.1.6 Required Capabilities:**

#### **3.1.6.1 Offeror experience and capability**

Offerors must demonstrate the ability to perform the following activities:

1. Have provided Implementation Services of the type described herein for two (2) or more years;
2. Have capacity to provide resources for multiple projects over the life of the contract.
3. Commitments for TOs awarded under this IDIQ will be considered when awarding multiple TOs to Implementers.

*(Offeror should provide responses to and provide examples to meet the requirements above.)*

Offeror Response:

3.1.6.1(1-3)

#### **3.1.6.2 Implementer Experience:**

The following skills are highly desired for the Implementer's staff:

1. Government experience (Public Sector)
2. Demonstrated experience in continued process improvement
3. Appropriate Certifications for Salesforce.com, Google, and Perceptive implementations as required for each TO.

*(Offeror should provide responses to and provide examples to meet the requirements above.)*

Offeror Response:

3.1.6.2 (1-3)

### **3.1.7 Key Personnel**

Each TO plan submitted to state agencies for Implementation services must include a resume including at a minimum their name, years of specific experience, and skills of key personnel proposed in the TO.

The Implementers and OIT agree such named key personnel are critical to the performance of the TO and cannot be removed from the work without OIT approval. The State has the right of refusal of any personnel assigned to this IDIQ and associated TO work. If substitution of key personnel is approved, qualifications for suggested staff replacements must be comparable with those previously identified in the TO.

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:

3.1.7

### **3.1.8 Agency TO Procedure**

There are many different activities for the TO engagements associated with this IDIQ, and the OIT team and ATOS must carefully consider the costs vs. benefits of each activity relative to the needs and attributes of the TO. Once the ATOS has identified the activities required based on their specific project needs, the ATOS will complete and submit a TO for Implementation Services to the OIT Procurement Manager. The OIT Procurement Manager will submit the TO to the pool of Implementers selected as a result of this RFP. The Implementers will be asked to submit a plan for fulfilling the TO, the time frame required for completion, and a cost for the work of the TO. The OIT Procurement Manager will submit the plan and cost to the ATOS, and the ATOS will select the Implementer to complete the TO. The OIT Procurement Manager will notify the Implementer of the TO award, process the TO, and once executed the work can begin. We are estimating this TO process will be completed, and notification given within thirty (30) business days. It is important to ensure that in the submittal of the proposed plan, the Implementer focuses on improving performance leading to a successful delivery. Therefore, you can expect the ATOS and OIT may consider the following Implementer qualifications:

1. Deep and proven experience with the business solution and the vocabulary of the business.
2. Knowledge of the solution technology. The Implementer may not need to be an expert in the underlying technology (depending on the type of project and the specific engagement) but must possess sufficient knowledge of the Service Providers to insure a successful implementation.
3. Understanding of industry standards Service Provider Standards, as well as the OIT EAG Standards and how they apply to the TO.
4. The capacity and capability to articulate a clear and cogent strategy and set of processes on how it will conduct the implementation of the TO.
5. Ability to perform the Implementation in a manner that does not detract from or hinder the Agency's operations throughout the implementation.
6. Possesses a clear and documented set of tools, checklists, success criteria, and reporting methods for the specific implementation and business purpose of the specific TO.
7. Proven experience in implementations for the Service Providers related to the TO, solid references, for both the company and for the key individuals the company is proposing for the TO. Experience with performing similar implementations in the public sector can also be very valuable.
8. Selection of your proposal from this solicitation only guarantees Implementers eligibility to respond to future agency task orders for services and no guarantee of work exists if their response to agency task orders is not selected. All awards are final and not subject to appeal. The selected Implementers must complete the deliverables within the timeframe and budget of the task order.
9. The State reserves the right to reject any or all task order proposals, to waive any irregularity or informality in a task order proposal, and to accept or reject any item or combination of items, or task order proposals that do not contain all elements and information requested in the task order on behalf of the State. In certain circumstances OIT may bypass this process if it determined to be an emergency or risk to the project.

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:

3.1.8 (1 thru 9)

### **3.1.9 Deliverable Acceptance Process**

The assigned ATOS shall perform all work associated with acceptance of Deliverables of the TO as a matter of high priority. The length of time to review such deliverables for acceptability shall be commensurate with the scope, complexity, need for verification of contents, and volume of work to review. TO Deliverables shall be sent to the Procurement Manager in electronic format on the due date as agreed upon in the TO. The deliverables must be checked for quality prior to delivery and must be accompanied by a deliverable certification form that contains a summary of the deliverable. Acceptance of the Deliverables by the ATOS and AEA is a prerequisite to approval by OIT. The State will require a ten (10) business day review period for the deliverables defined and received as a result of any TO associated with this IDIQ.

Deliverables will be reviewed for completeness based on achievement of their purpose and objectives, inclusion of required contents, volume and thoroughness of their contents, and accuracy of their information. Artifacts created in support and development of deliverables must support the contents of the deliverables. Deliverables must meet the criteria described in the TO and specific ATOS approval of the deliverables to be deemed acceptable. All required payments will be made in 45 days in accordance with the contract.

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:

3.1.9

### **3.1.10 Invoice Requirements**

Complete invoices must be submitted to the Agency TO Sponsor in accordance with Section 3.3.9 Acceptance of Deliverables. Upon acceptance the Implementer can submit an invoice for the deliverable value identified in the TO. Each invoice must contain:

1. Invoice number
2. Invoice date
3. Implementer name
4. Implementer contact information
5. Remit to address
6. Federal Tax ID
7. TO name

8. Agency TO sponsor
9. Deliverable approval date
10. Brief description of the deliverable
11. Deliverable ID# (recurring deliverables will also include: x of x, i.e. 2 of 5)
12. Amount of the deliverable
13. TO number

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:  
3.1.10 (1 thru 13)

### **3.1.11 Task Order Deliverables Format**

All deliverables must follow the Deliverables Acceptance Process. All templates required for OIT reporting will be provided at the time of IDIQ contract award. All TO deliverables for this contract shall be provided in electronic form, using the following software standards (or lower convertible versions):

<b>Document Type</b>	<b>Format</b>
Word Processing	Microsoft Word 2003 or Higher
Spreadsheets	Microsoft Excel 2003 or Higher
Graphics	Microsoft Power Point 2003 or Microsoft Visio 2003 or Higher
Project Management	Microsoft Project 2003
Text Formatter	Adobe

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:  
3.1.11

### **3.1.12 State Responsibilities**

The State and OIT are responsible for the following items to help successfully facilitate the Implementers in fulfilling the awarded TO:

1. Workspace for up to 5 Implementers staff while on-site at the projects for the duration of the contract. The workspace will include desk or tables, phone and access to the Internet. The Implementers is expected to have regular office space separate from the project site. If additional workspace is required for any TO, the Implementer will make that request as a part of the TO. Implementers may work offsite in developing solutions for TO if approved in writing by ATOS and OIT.
2. Access to TO information, including, but not limited to, technical documentation and TO status data.
3. Access to the TO and Implementers personnel for information related to the TO.
4. The State is not responsible for providing clerical or administrative support to the Implementer.

*(Offeror should indicate understanding and agreement of the State responsibilities listed above.)*

Offeror Response:

3.1.12 (1-4)

### **3.1.13 Travel and Miscellaneous Expenses**

The Implementer is expected to include all travel and accommodations expense in the submitted cost of the TO. All other expenses such as supplies, software, software tools, parking, meals, tips, and/or other related items required in performance of the TO will not be reimbursed by the State.

*(Offeror should indicate understanding and agreement of the State responsibilities listed above.)*

Offeror Response:

3.1.13

### **3.1.14 Licensing Expense**

To the extent required for successful implementation of the TO, Implementers will be required to acquire the appropriate developer or implementation licenses from the appropriate Service Providers to insure successful implementation.

*(Offeror should indicate understanding and agreement of the requirements above.)*

Offeror Response:

3.1.14



### **3.1.15 Cost Proposal**

Offerors responding to the RFP will be asked to provide a per hour rate for IDIQ task activities in their Cost Proposal. The Offeror is also asked to identify the cost any special services it offers if not addressed in the RFP. This per hour rate will be the maximum rate applied to any task order for any Agency for any project over the life of the contract. The Cost Proposal should be sealed separately from the rest of your proposal.

Provide the hourly rate for each position proposed to provide services to the State under this Master Task Order Contract. **See Attachment C for the response form.**

## **4 Offeror Response Format**

### **4.1 PROPOSAL SUBMISSION**

Proposals must be received on or before the Bid Submission Deadline as indicated on BIDS. **Late proposals will not be accepted.** It is the responsibility of the Offeror to ensure that the OIT Procurement Office, on or before the Bid Submission Deadline, receives their proposal. Offerors mailing their proposals shall allow sufficient mail delivery time to ensure receipt of their proposals by the Bid Submission Deadline. All proposals submitted must be "sealed"; i.e. package, envelope, box, etc.

Proposals must be submitted in a **sealed** package with an appropriate label affixed. The label must show the following information:

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**Offeror's Name**  
**RFP-No.**  
**Proposal Due Date and Time**

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**Offerors must segregate the portion of the proposal responding to the Cost.**

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The proposal must be signed in ink, preferably blue ink, by an officer of the Offeror who is legally authorized to bind the Offeror to the proposal. Proposals that are determined to be at a variance with this requirement may not be accepted. A Request for Proposals Signature Page has been provided.

The State desires and encourages that proposals be submitted on recycled paper, printed on both sides. While the appearance of proposals and professional presentation is important, the use of non-recyclable or non-recycled glossy paper is discouraged.

Proprietary/confidential information must be submitted in accordance with the Proprietary/Confidential Information section of this RFP/IDIQ. In addition, an Offeror shall provide all proprietary/confidential information in its electronic response on a separate CD/USB flash drive clearly marked as such.

### **4.2 REQUIRED COPIES**

The original hard copy in all cases is the official record and shall be used to resolve any differences.

Offerors are required to submit one (1) original, five (5) copies, and one (1) electronic copy (preferably in Microsoft Word or Microsoft Excel, where appropriate) and the required number of copies as stated on the Request for Proposal Signature Page. The electronic copy shall be provided either on a CD or USB Flash Drive.

As indicated previously, Proprietary/Confidential information must be submitted on a separate CD/USB Flash Drive, clearly marked as such.

### **4.3 PROPOSAL ORGANIZATION**

Offeror's proposal must be submitted with all material clearly labeled or, such other organization that will facilitate the committee members' evaluation. Offeror's proposal must include tabs and a Table of Contents.

Do not include extensive artwork, unusual printing or binding, or other materials, which do not enhance the utility or clarity of the Offeror's proposal. General statements without supporting documentation are not encouraged. Documents should be double sided on recycled paper, and easy to copy/scan (no bound material, clips, etc.). Paper should be white or extremely light paper without dark backgrounds. Enhance electronic images for pages with a poor image quality.

#### **4.4 STATE OF COLORADO REQUEST FOR PROPOSAL SIGNATURE PAGE**

The State of Colorado Request for Proposal Signature Page, **MUST** be signed in ink by the Offeror or an officer of the Offeror legally authorized to bind the Offeror to the proposal. Proposals, which are determined to be at a variance with this requirement, may not be accepted.

#### **4.5 TRANSMITTAL LETTER**

The Transmittal Letter must:

- Be printed on your official business letterhead.
- Identify all materials and attachments that comprise your proposal.
- Be signed in ink by an individual authorized to commit you to the work proposed.
- Disclose any intended use of subcontracts and identify any prospective sub-Implementers.
- Disclose all current, pending or bided contracts with the State of Colorado.
- Acknowledge receipt of all amendments, addenda and modifications to this RFP.
- Include ALL potential conflicts related to this RFP, the attached standard contract, and any other services related to this contract.

#### **4.6 BUSINESS PROPOSAL**

The Business Proposal must present a full and complete description of the qualifications and approach of the Offeror to carry out the Scope of Work Requirements set forth in Section 3 Scope of Work. Restate each of the requirements and describe in detail how you propose to provide the service and meet each of the requirements. Proposal shall include a Table of Contents, tabbed and indexed.

No reference shall be made to any pricing information or elements of cost within the Business Proposal. If any element of cost is referred to in this document, the Offeror's proposal may be disqualified.

The Business Proposal must include and follow the format described in the following sections and paragraphs.

#### **4.7 Executive Summary**

Condense and highlight the contents of the Business Proposal. Describe the approach to be used in completing this project. The summary must convey a clear and concise overview of your proposal.

#### **4.8 Offeror Overview**

Use this section to respond to the Scope of Work Requirements outlined in Section 3.

For Section 3.1.4 Offeror Experience and Capability, Offeror shall include three (3) references from similar projects. Please note that OIT reserves the right to contact and evaluate information from the references provided by an Offeror (primary sources) to validate the Offeror's experience. OIT may also contact other individuals and entities (secondary sources) identified as possessing relevant information during the course of proposal evaluation. Offerors should expect that references will be contacted and should make references aware of this requirement. The State reserves the right to use itself as an additional reference.

Please include the following for each of the three references:

- Company name and address
- Contact person name, title, relationship to Offeror, phone number (cell and work), and email address
- Description of business and application and/or project performed
- Description of methodology utilized for similar projects by the Offeror
- Results of the project (i.e., on time, on budget, etc.)
- Length of time and effort required for the project

## **5 Proposal Evaluation**

An Evaluation Committee will judge the merit of proposals timely received in accordance with the criteria outlined in the Offeror Response Format section of this RFP.

This section supplements paragraph 3.8, "Evaluation and Award," in the Colorado Solicitation Instructions/Terms and Conditions that are available through the link on BIDS.

### **5.1 EVALUATION PROCESS**

OIT will undertake an intensive, thorough, complete and fair evaluation process. All Offerors shall be afforded fair and equal treatment throughout the evaluation process.

### **5.2 EVALUATION COMMITTEE**

Each Evaluation Committee member will independently evaluate the merits of proposals received in accordance with the evaluation factors stated within this RFP, followed by discussion of the entire Evaluation Committee. The sole objective of the Evaluation Committee will be to recommend for award the proposal(s) determined most advantageous to the State.

### **5.3 BASIS FOR AWARD**

The purpose of this RFP is to solicit proposals for the goods/services specified herein. The requirements stated within this RFP represent the minimum performance requirements necessary for response as well as desired elements of performance. All proposals must meet the mandatory minimum requirements established by this RFP to be eligible for award.

Evaluation and award will be based on the following factors, in decreasing order of importance:

#### **Technical Proposal and Cost**

### **5.4 EVALUATION BASED ON INITIAL PROPOSALS**

OIT reserves the right to make an award(s) on receipt of initial proposals, so Offerors are encouraged to submit their most favorable proposal at the time established for receipt of proposals.

Proposals requiring major revision in order to be considered for any award, or otherwise not meeting the mandatory or other requirements required for further consideration as specified in this RFP, may be classified as unacceptable and ineligible for further consideration.

The technical aspects of proposals will be assessed based on the soundness of the Offeror's approach and the Offeror's understanding of the requirement. Past experience/qualifications will be assessed by considering the extent to which the qualifications, experience, and past performance are likely to foster successful, on-time performance. Technical and past experience assessments may include a judgment concerning the potential risk of unsuccessful or untimely performance, and the anticipated amount of State involvement necessary to insure timely, successful performance.

## **5.5 COMPETITIVE RANGE**

OIT may establish a competitive range of Offerors whose proposals have been initially evaluated as most responsive to the requirements and reasonably susceptible of being selected for award.

## **5.6 CLARIFICATIONS/DISCUSSIONS**

OIT may conduct discussions with Offerors for the purpose of promoting understanding of OIT's requirements and the Offeror's proposal, clarifying requirements, and making adjustments in services to be performed and in prices and or rates. Offerors engaged in such discussions may be sent a list of questions and will be given a specified number of days in which to formulate and submit written responses to the questions and provide any related revisions to their initial proposals. The nature of the questions will be, generally, clarifying in nature and will permit related revisions to proposals. Such revisions will be at the option of the Offeror, but will be limited to the guidelines set forth in OIT's requested clarifications. No major changes will be permitted, nor will OIT accept any additional written materials not relevant to the questions/clarifications requested. Clarifications/discussions may be limited to Offerors within the Competitive Range.

## **5.7 PRESENTATIONS/DEMONSTRATIONS**

Offerors may be given an opportunity to provide an oral presentation or demonstration. OIT reserves the right to select the site. During the presentation, an Offeror should provide specific responses to the questions posed to it and may also make a summary presentation of its proposal. The presentation should include a description of how Offeror's revisions, if any, may have affected the over-all nature of its offer as compared to the initial proposal. The presentation is typically limited to 60 minutes. If the Evaluation Committee members believe it to be necessary, a question/answer period may follow. Presentations/Demonstrations may be limited to Offerors within the Competitive Range.

## **5.8 ON-SITE INSPECTION**

An Offeror may be required to provide, at the Offeror's expense, an on-site visit at the prospective site where the work will be performed. OIT will provide a list of reasonable and necessary expenses for these visits, which will be paid in advance by the Offeror. The on-site Evaluation Committee members will arrive at the Offeror's office at the date and time mutually agreed to between OIT and the Offeror, within 14 days of notice of inspection. All on-site inspections conducted by OIT will be evaluated on a pass/fail basis. OIT reserves the right to allow the Offeror to propose another site if the first site proposed fails the on-site inspection. On-site inspections may be limited to Offerors within the Competitive Range.

## **5.9 BEST AND FINAL OFFERS (BAFO)**

Adjustments may also be allowed in conjunction with clarifications, discussions, presentations and or demonstrations, but only to the extent such revisions are consistent within the proposal requirements. These revisions will be considered as best and final offers. Such adjustments must be submitted in writing.

## **5.10 FINAL EVALUATIONS**

After completion of clarifications, presentations, and BAFOs, as may be required, the Evaluation Committee will re-consider the initial proposal ratings and may make any adjustments they believe to be warranted as a result of the additional information obtained.

## **5.11 AWARD RECOMMENDATION**

Upon completion of the evaluation process, the Evaluation Committee will formulate a recommendation as to which proposal(s) is/are determined to be most advantageous to the State within available resources. A formal recommendation of the Evaluation Committee will be forwarded to the OIT, Purchasing Agent for review and approval.

## **5.12 NOTICE OF INTENT TO AWARD**

Upon approval of the recommendation, a Notice of Intent to Award will be published on BIDS. Upon issuance of the notice, all non-proprietary/confidential documents submitted by all Offerors, not just the awarded Offeror(s), shall become public records and will be available for inspection. The time period for consideration of any protest of the award decision will commence at this time. The Awarded Offeror(s) will be contacted by OIT to complete post award requirements.

## **5.13 ADEQUACY AND COMPLETENESS OF RESPONSE**

In general, all aspects of a proposal will be evaluated based on its adequacy and completeness with regard to the information specified in the RFP; i.e., compliance with terms, conditions and other provisions contained in the RFP, as well as Offeror's ability to read and follow instructions. Failure of an Offeror to provide the information required in this RFP may result in disqualification of the proposal. This responsibility belongs to the Offerors.

## **5.14 CONTRACT REVIEW**

Offerors must review the attached Model Contract and list any exceptions or confirm that no exceptions are taken to the State's contract. Any exceptions to the Model Contract must be accompanied by alternative or substitute language which would be acceptable to the Offeror. OIT will review the proposal to ensure the Offeror has not taken any exceptions to the State's contract provisions which may be deemed unacceptable or exceptions to stated requirements which may be deemed unacceptable in meeting the needs of the State. Any exceptions taken could result in elimination of the Offeror's proposal from further consideration, or result in delay or failure to execute a contract, whereby the State could terminate the award and commence negotiations with another Offeror. Exceptions to the State of Colorado Special Provisions, attached to the contract, will not be accepted.