STATE OF WASHINGTON
OFFICE OF FINANCIAL MANAGEMENT

RFQQ NO. 16-800

Project Management Services

AMENDMENT NO. FOUR (4)

CHANGES TO RFQQ DOCUMENT

1. INTRODUCTION

1.6 ACQUISITION PROCESS

Bidders may submit responses for either of the service categories shown *1.2 Scope and Objectives for this Acquisition*. Bidders are not required to submit a response to both of the service categories. Based on the evaluation process described in this document, OFM will create an unranked list of pre-qualified vendors to provide project management services on an as-needed basis. Pre-qualified vendors will be expected to sign a Convenience Contract with OFM. The Pre-Qualified Vendors' List will be comprised of the **five (5)** ~~three (3)~~ highest-scoring bidders for each service category. The Pre-Qualified Vendors List may be utilized by OFM to select vendors for work on an as-needed basis. Receiving a contract through this competition does not guarantee a Contractor will receive work.

As the need for project management services arises, all Contractors on the Pre-Qualified Vendors List for the relevant service category will be invited to submit a response to a second-tier review that meets OFM's business requirements. The second-tier process may include a review of the Contractor's availability and capacity to manage the project, the experience of the person proposed for the specific project management engagement, the proposed cost of the project management, and the Contractor's project management approach to the particular project. OFM will review all responses submitted for consideration and will, in its sole discretion, select Contractor(s) to provide those services for OFM. OFM, at its sole discretion, retains the right to select the most qualified Contractor(s) from the responses received.

For any given engagement, staff from multiple pre-qualified vendors may be selected to meet OFM's needs, and Statements of Work will be issued against the Contractor's Convenience Contract at that time.

3. PROPOSAL CONTENTS

~~**The proposal must be written in English and submitted on 8½" x 11" paper with tabs separating the major sections of the proposal. The font throughout the entire proposal shall be no smaller than 10.**~~ The two major sections of the proposal are to be submitted in the order noted below:

3.1 Administrative Requirements (Section 1 of Proposal)

3.2 Service Categories

A. Project Management
B. IT Project Management

3.3 Cost Proposal/Quotations

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Bidder in preparing a thorough response.

3.1 ADMINISTRATIVE REQUIREMENTS (Section 1 of Proposal)

A. Letter of Submittal. The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A to this RFQQ) must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, e.g., the president or executive director of a corporation, the managing partner of a partnership, or the proprietor of a sole proprietorship. Signing the Letter of Submittal indicates that the Bidder accepts the terms and conditions of the RFQQ. The Letter of Submittal shall contain the following information:

(1) Name, address, principal place of business, telephone number, fax number, and e-mail address of the legal entity or the individual with whom the contract would be written.

(2) The name of the contact person for this RFQQ.

(3) Legal status of Consultant (sole proprietorship, partnership, corporation, etc.) and the year the entity was established to do business as it now substantially exists.

(4) Name, address, and telephone number of each principal officer (President, Vice-President, Treasurer, Chairperson of the Board of Directors, etc.)

(5) Federal Employer Tax Identification number or Social Security number and the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue. If the Consultant does not have a UBI number, the Consultant must state that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor.

(6) Location of the facility from which the Consultant would operate.

(7) Indicate how many employees are with the firm.

(8) Identify any state employees or former state employees employed by the Consultant or on the Consultant's governing board as of the date of the proposal. Include their position and responsibilities within the Consultant's organization. If following a review of this information, it is determined by the

AGENCY that a conflict of interest exists, the Consultant may be disqualified from further consideration for the award of a contract.

(9) If the Consultant's staff or subcontractor's staff was an employee of the state of Washington during the past 24 months, or is currently a Washington State employee, identify the individual by name, the agency previously or currently employed by, job title or position held, and separation date.

(10) If the Consultant has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Consultant's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.

(11) Submit full details of the terms for default, including the other party's name, address, and phone number. Present the Consultant's position on the matter. The AGENCY will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the Consultant in the past five years, so indicate.

(12) A list of all RFQQ addenda downloaded by the Bidder from WEBS and listed in order by addenda number and date. If there are no RFQQ addenda, the Bidder must include a statement to that effect.

(13) A statement substantiating that the person who signs the letter is authorized to contractually bind the Bidder's firm.

(14) A statement substantiating that the Bidder meets all of the Minimum Qualifications as listed in **Section 1.3, Minimum Qualifications**. Such statement must apply to the Service Category for which the Bidder is bidding.

(15) Identification of the page numbers on the Bidder's Proposal that are marked "Proprietary Information".

(16) The Bidder Certification and Assurances form.

B. Identification of Category Being Bid

Bidder is to identify the Category of service listed in Section 1.2, *Scope and Objectives for this Acquisition* on which they are bidding. Bidders are not required to submit a response to both of the categories

C. References

List names, addresses, telephone numbers, and fax numbers/e-mail addresses of three (3) business references for the Bidder (Firm) **~~and three (3) business references for the lead staff person~~** for whom work has been accomplished and briefly describe the type of service provided. Do not include current AGENCY staff as references. By submitting a proposal in response to this RFQQ, the Bidder and team members grant permission to AGENCY to contact these references and others, who from AGENCY's perspective, may have pertinent information. AGENCY may or may not, at AGENCY's discretion, contact references. The AGENCY may evaluate references at the AGENCY'S discretion.

D. OMWBE Certification

If you are certified as a minority-owned firm and/or women-owned firm, include proof of certification issued by the Washington State Office of Minority and Women's Business Enterprises (OMWBE).

3.2 SERVICE CATEGORY (Section 2 of Proposal)

Bidders may submit Qualifications and Quotations for either or both of the categories listed in Section 1.2, *Scope and Objectives for this Acquisition*.

Each category proposal shall be presented in a section discrete from the other category.

The qualifications section of the proposal must contain information that will demonstrate to the evaluation committee the Consultant's understanding of the types of services proposed, the Consultant's ability to accomplish them, and the ability to meet tight timeframes. The Qualifications Section must also demonstrate the capabilities of the staff to perform the services.

Numbering of Responses. Please number each response so that it corresponds to the question number. The response must begin with a restatement of the question followed by the Bidder's response to the question. A reference to another section will not suffice, each answer must stand alone.

Attachments. Attachments must be labeled and tabbed and the question number to which it responds must be indicated.

Points Awarded for Responses. The number in parentheses after each question or requirement represents the maximum number of points that may be awarded for the Bidder's response to that question or requirement.

A. Project Management

Scope: The contracted Project Managers may be expected to provide the following services should they do work for OFM under a Convenience Contract:

- Expert advice & counsel
- Observing and assisting in group sessions
- Managing/leading multi-disciplined project teams & resources
- Managing Consultants
- Defining team roles and responsibilities
- Communicating with and facilitating decision-making among stakeholders
- Defining project work to an appropriate level of detail
- Assigning and monitoring completion tasks
- Managing budgets and project schedules
- Identifying project risks and ways to mitigate these risks
- Facilitating conflict resolution
- Project status reporting and executive sponsor briefing
- Communicating and coordinating with next-higher level of management on project

(1) Firm Qualifications/Experience

Describe services provided by the Bidder that indicate the firm's ability/qualifications to provide the services described in the Project Management Scope statement above.

(40 points possible)

(2) Project Experience

OFM is seeking a team-oriented, highly collaborative project manager with a substantive and proven track record of success managing projects.

Provide three relevant project experiences your firm has handled and include the following information: the role of the Bidder's project manager, scope of project, deliverables, budget, greatest challenges, and final status. OFM values project case studies which reflect project management experience. Include the following attributes as appropriate:

- Acting as the lead project manager
- Working with highly federated Public Sector Clients
- Managing projects in the State of Washington

Provide contact information (name, title, phone number) for each case study. OFM reserves the right to contact these clients in order to pursue a reference.
Limit responses to no more than 6 pages, two pages for each case study.

(40 points possible)

(3) Bidder's Understanding of Environment

Describe your understanding of OFM and the challenges of managing projects for the State of Washington.

(30 points possible)

(4) Difficult Project Experience

Every project manager has had projects that did not progress as expected or who was brought in to save a project that was failing. Describe a difficult project that required substantial adjustments to recover. Explain the situation(s) that made the project difficult and the strategies/tactics used for recovery. Describe the ultimate outcome and key lessons learned.

(20 points possible)

B. IT-Related Project Management

Scope: The contracted IT-Related Project Managers must be prepared to provide the services identified in Category A and these additional services

- Managing information systems projects consistent with the Office of the Chief Information Officer (OCIO) policies and guidelines
- Developing detailed IT project work plans and planning activities
- Managing/Leading teams of IT technical staff
- Guiding and providing mentoring for IT project leaders and staff
- Writing IT feasibility studies
- Developing plans for analysis, design, construction, testing, implementation, quality assurance, and systems acceptance

Please describe Bidder's experience and provide detail in the following areas that would qualify you to perform the work as described in the scope statement above:

(1) Firm Qualifications/Experience

Describe services provided by the Bidder that indicate the firm's ability/qualifications to provide the services described in the IT-related Project Management Scope statement above.

(40 points possible)

(2) Project Experience

OFM is seeking a team oriented, highly collaborative project manager with a substantive and proven track record of success managing IT-related projects.

Provide three relevant IT-related project experiences **your firm has handled** ~~for the proposed project manager~~ and include the following information: the role of the **firm's** ~~proposed~~ **project manager**, scope, deliverables, budget, greatest challenges, and final status. OFM values project case studies which reflect project management experience. Include the following attributes as appropriate:

- Acting as the lead project manager
- Implementing information technology projects
- Working with highly federated Public Sector Clients
- Managing projects in the State of Washington

Provide contact information (name, title, phone number) for each case study. OFM reserves the right to contact these clients in order to pursue a reference.
Limit responses to no more than 6 pages, two pages for each case study.

(40 points possible)

(3) Bidder's Understanding of Environment

Describe your understanding of OFM and the challenges of managing IT-related projects for the State of Washington.

(30 points possible)

(4) Difficult Project Experience

Every project manager has had projects that did not progress as expected or who was brought in to save a project that was failing. Describe a difficult project that required substantial adjustments to recover. Explain the situation(s) that made the project difficult and the strategies/tactics used for recovery. Describe the ultimate outcome and key lessons learned.

(20 points possible)