



# Pre-Proposal Conference

Strategic Partner Competitive Procurement

February 2, 2017



# Purpose

## Purpose:

To provide the Bidder community an opportunity to learn about the Competitive Procurement (CP) process and allow for questions and feedback.

## Today we want to:

- Introduce the One Washington team
- Provide an overview of the One Washington program
- Share detailed information about RFP OFM 16-1900
- Offer time for questions





# Overview of the One Washington Program

# One Washington Program – Strategic Vision



## OFM Strategic Vision:

Better information. Better decisions.  
Better government. Better Washington.

One Washington aligns with OFM's strategic vision to improve access to data through transformation of business processes and modernization of enterprise systems.

# One Washington



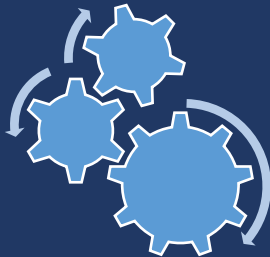
One Washington is a long-term (possibly as long as ten years) business transformation effort of business processes that are common across state government.

## One Washington Enterprise Systems

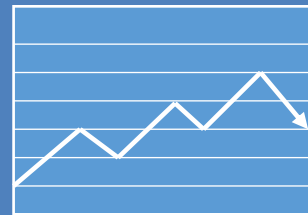
Financials



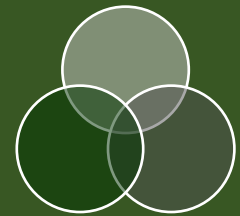
Procurement



Budgeting

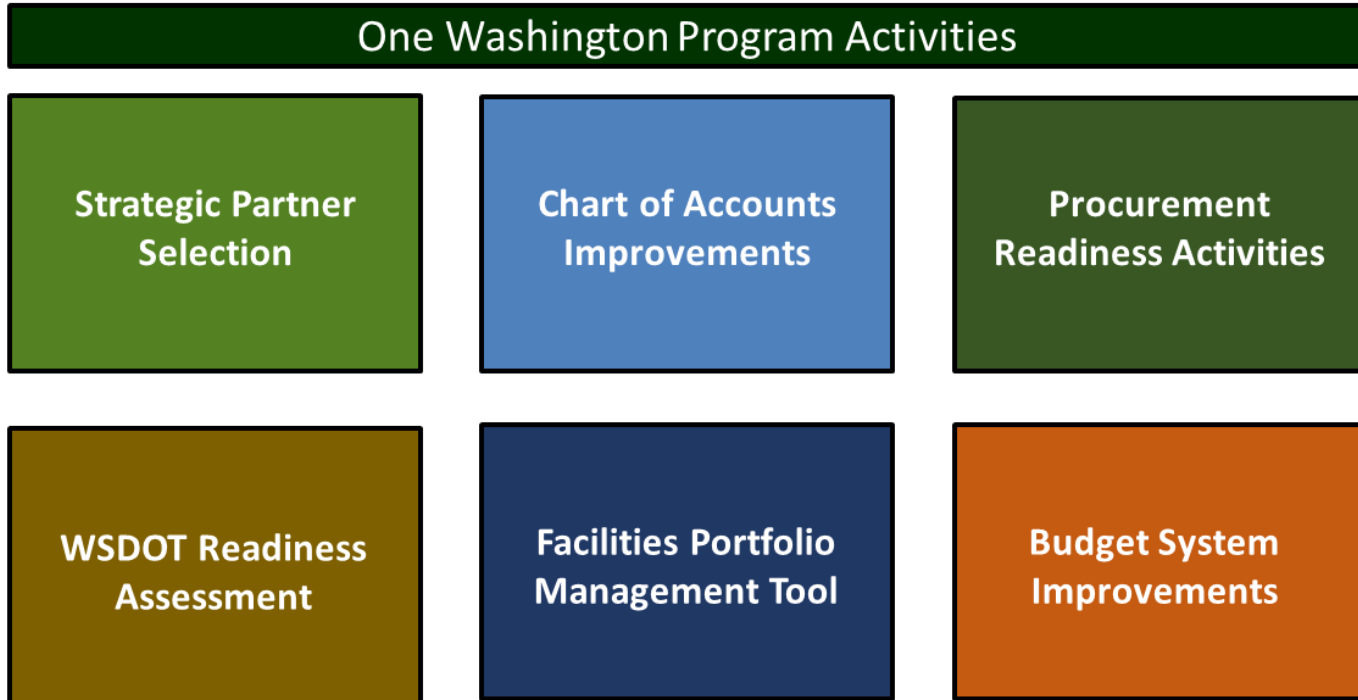


Human Resources



# 2015-17 Biennium Activities

One Washington's current efforts are divided into six work streams.



# One Washington Approach



- **Typical Approach**

- Choose a software or system, then choose an implementer

- **Our Approach**

- Choose a Strategic Partner/Implementer to assist us with the planning, phasing and structuring of our implementations to achieve in incremental, fundable amounts.

- Strategic Partner will be a long term relationship over many incremental projects/phases

# Strategic Partner Approach Benefits

## Strategic Partner Selection Process within One Washington:

The Strategic Partner (SP) selection process within the One Washington program seeks to identify, select and contract with a qualified vendor who has experience with systems integration and implementation to assist in the replacement and transformation of existing processes and systems in order to improve access to decision making data.

Advantages of the SP approach include:

- Focuses efforts on incremental, implementable business transformations
- Promotes flexibility, agility and “pay as you go” implementation





# Strategic Partner Relationship

## State of Washington

- Governance and leadership
- Subject matter experts
- Software selection and requirements definition
- Acceptance testing
- Staffing for state responsibilities (e.g. UAT)

## Project Management Support

- Support One Washington decision making
- Track progress, risks and issues

## Strategic Partner

- Provide access to appropriate staff with skills & experience
- Contribute lessons learned and experience from prior clients
- Complete agreed upon statements of work

## Software Solution Provider

- Provide software and appropriate support

Note: These responsibilities are illustrative and not exhaustive

# Strategic Partner Qualifications

One Washington seeks a long term, committed partner who will invest in creating and sustaining a strategic relationship

## Partnership

- Consistent leadership and staffing
- Efforts and success viewed holistically
- Ability to weather difficult situations and potential funding challenges
- Strong relationships with other vendors, service providers, and agencies



# Potential Strategic Partner Services



## Potential Activities

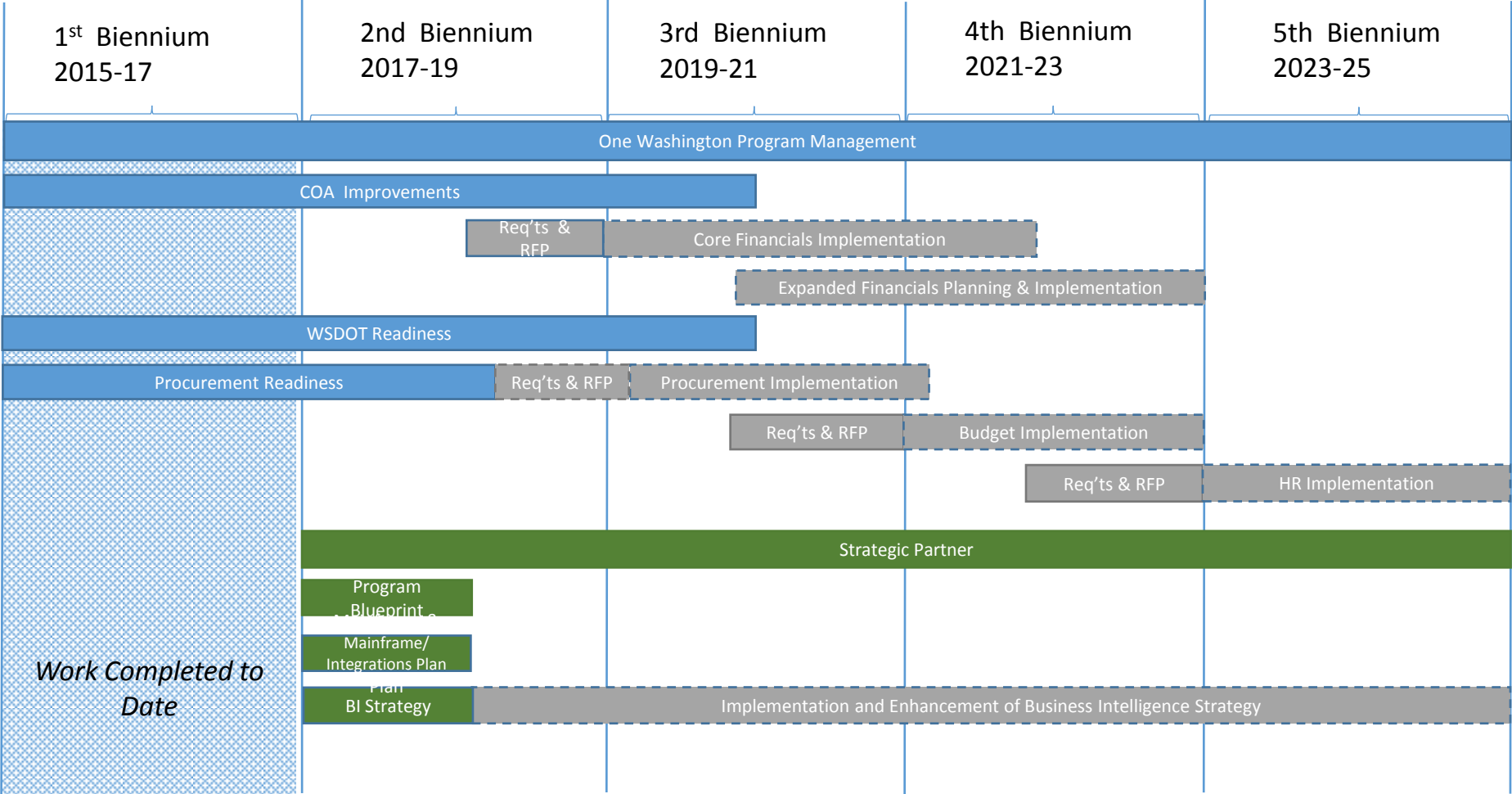
- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>• Technology strategy &amp; planning</li><li>• Assessment and recommendations</li><li>• Business process reengineering</li><li>• Benefits realization</li><li>• Change management</li><li>• Infrastructure planning &amp; implementation</li><li>• Business continuity/disaster recovery</li><li>• Data security</li></ul> | <ul style="list-style-type: none"><li>• Implementation &amp; integration</li><li>• Interfaces &amp; integration</li><li>• Data conversion &amp; retention</li><li>• Business intelligence &amp; data warehousing</li><li>• Document management</li><li>• Testing and remediation</li><li>• Training</li><li>• Stabilization activities</li></ul> |
|--|--|

Note: This is not an exhaustive list

# SP Relationship – Relationship Agreement

- Umbrella agreement
  - Primary procurement for services
  - Overarching terms and conditions (T&Cs)
  - Addresses framework and T&Cs for distinct phases
  - Effectively places SP vendor on retainer for in scope services
- Statements of Work
  - Defines scope under terms of the Umbrella Agreement
  - Discrete efforts with timelines, deliverables & fixed fee pricing
  - Funding and payments associated with SOWs
  - Negotiated hours and calculated from the Rate Card

# One Washington Program Schedule – 2017-19 Decision Package



*Work Completed to Date*

# Competitive Procurement – Initial Statements of Work

## SOW 1: Strategic Partner Integral Consultants

- Resumes
- References
- Rate Card

## SOW 2: One Washington Program Blueprint

- First Deliverable – Due September 20, 2017  
Program Blueprint Version 1
- Second Deliverable – Due December 20, 2017  
Program Blueprint Version 2
- Third Deliverable – Due June 20, 2018  
Program Blueprint Version 3




# RFP OFM 16-1900

## Administrative Proposal

# Administrative Proposal



Administrative Requirements	
2.1 Coordinator	Becci Riley
2.2 Schedule	Proposals Due by 3:30pm Mar 1, 2017
2.3 Revisions	May occur at any time
2.4 Q&A	Round 1:  Round 2 Questions: Feb 9, 2017/Feb 15, 2017
2.5 Complaints	Deadline: Feb 22, 2017
2.6 Costs to Participate	Bidder's responsibility
2.7 No Obligation to Contract	OFM may refrain from contracting
2.8 Rejection of Proposals	OFM may reject any or all proposals
2.9 Electronic Payment	Register in Statewide Vendor Payment System



# Administrative Proposal



## Administrative Requirements

2.10 Submission	<ul style="list-style-type: none"><li>• Seven (7) Hard Copies in 3-ring binders</li><li>• One (1) Electronic Copy</li><li>• Information in order, clearly labeled, numbered</li><li>• “M”, “MS”, “MSCOR”</li></ul>
2.11 Letter of Submittal	Letterhead, required info, signed
2.12 Umbrella Contract	<ul style="list-style-type: none"><li>• Overarching terms and conditions (T&amp;Cs)</li><li>• Addresses framework and T&amp;Cs for distinct phases</li><li>• Effectively supports program continuity through long term access to SP vendor expertise for in scope services</li></ul>

# Administrative Proposal



Administrative Requirements	
2.13 Holdback	10%, including dependencies
2.14 Sample Contract	Requested exceptions must be submitted
2.15 Certification and Assurances Form	Must be completed
2.16 Current/Former State Employees	Review requirements, disclose
2.17 Prior State Contracts	Any state contracts within the last 24 months
2.18 Proprietary Information/Public Disclosure	Responses become OFM property. Mark <i>specific</i> proprietary information accordingly.
2.19 Prior Contract Performance	Disclose terminations for default

# Administrative Proposal



Administrative Requirements	
2.20 Diversity Participation	Small Business, Veteran-Owned, OMWBE are encouraged, not required
2.21 Responsiveness	Administrative review for complete response
2.22 Withdrawal	Available until Due Date, may resubmit
2.23 Incorporation of Documents into Contract	Proposals are not for marketing and will become part of the contract
2.24 Insurance	(M) Provide proof of insurance(s)
2.25 Workers' Compensation	(M) Comply with laws, statutes, regulations



# RFP OFM 16-1900

## Scope of Work

# Scope of Work



## Scope of Work

### 3.1 Responsibilities

- **State Leadership and Expertise**
  - Governance and leadership
  - Program Leadership
  - Subject Matter Experts (SMEs)
  - Requirements and system selection
- **Project Management Office (PMO) Other Contractors**
  - Planning , strategy and tracking
  - Augment state resources
- **Strategic Partner –**
  - Provide industry leading information, insights and perspectives
- **Software Solution Provider(s)**
  - Best practices for implementation and usage of their product(s),

# Scope of Work



Scope of Work	
3.2 In Scope Services, Tools and Solutions	<ul style="list-style-type: none"><li>• Service area table</li><li>• Strategic Partner Allowed to Bid on Software Solutions</li></ul>
3.3 State Expectations of Strategic Partner Staffing	<ul style="list-style-type: none"><li>• SOW 1<ul style="list-style-type: none"><li>• Integral Consultants -consistent long-term staffing</li><li>• Co-located Olympia</li></ul></li><li>• Additional SOWs</li><li>• Subcontractors</li></ul>
3.5 Independent Relationship Review	<ul style="list-style-type: none"><li>• Annual relationship review</li><li>• Constructively participate</li><li>• Assess both One Washington and the Strategic Partner</li></ul>



# RFP OFM 16-1900

## Technical Proposal

# Strategic Partner Qualifications

## Minimum Qualifications of the Strategic Partner

Completed at least one statewide business process transformation and one financial system implementation which included ten (10) or more departments or agencies in the last five (5) years. One project could include both business process transformation and financial system implementation.





# Technical Proposal

## 4.3.1 Bidder Overview (MS)

- Executive Summary
- Description of service Lines and industries served

## 4.3.2 Subcontractor Overview (MS)

- Overview of each subcontractor and its role

## 4.3.3 Public Sector Practice (MS)

- Public Sector Experience
- Count of current public sector practitioners
- Breadth, depth, and capacity of public sector practice

## 4.3.4 Business Transformation Capabilities (MS)

- Similar transformation clients, projects, and efforts
- Critical success factors and Bidder's role in support



# Technical Proposal

## 4.3.5 System Implementation Capabilities (MS)

- Volume and breadth of experience implementing software packages which may include, but is not limited to: Advantage, PeopleSoft, SAP, Workday, best of breed solutions or other ERP technology.

## 4.3.6 Case Studies (MS)

- Three (3) Case Studies from comparable projects including:
  - Contact information
  - Project Description
  - Insights



# Technical Proposal

## 4.3.7 Transformation Approach (MS)

- Transformation Approach
- Key elements required for predictable, repeatable, and quality outcomes
- How this approach benefitted previous public sector implementations
- How the approach will support the services of this effort

## 4.3.8 Change Management Approach (MS)

- Change Management methodology and how it can be “rightsized”
- Recommended communication approach
- How the Bidder would suggest dividing activities



## 4.3.9 Partnership Philosophy and Approach (MS)

- Approach for partnering with the state
- How the Bidder’s culture supports the respective roles of the parties
- Views on critical success factors and guiding principles of the relationship
- The Bidder’s conflict resolution process

# Technical Proposal

## 4.3.10 Partnership Experience (MS)

- Describe a relevant project, providing a concise description of:
  - Detail the client's environment, objectives, and Bidder's contribution
  - Identify challenges and how they were addressed
  - Partnership philosophy and keys to successful win-win
  - Project contact information

## 4.3.11 Staffing Approach (MS)

- Statement of Agreement
- Staff selection process
- Ability to respond with qualified individuals within five-day response timeline
- Timely resourcing strategy
- Subcontractor network and how it may be leveraged
- Considerations for on-site vs. off-site staffing



# Technical Proposal

## 4.3.12 Statements of Work

- Discrete efforts with timelines, deliverables and fixed fee pricing
  - Defined scope for completion under terms of the Umbrella Agreement
  - Funding and payments associated with statements of work
  - Negotiated hours calculated from the Rate Card
- 
- 4.3.12.1 SOW 1: Strategic Partner Integral Consultants Resumes (MS)
    - Experience, education, certification
    - Individual's role within the firm
    - Length of employment with the Bidder
  - 4.3.12.2 SOW 2: One Washington Program Blueprint (M)
    - Narrative description of the approach to achieve SOW 2 outcomes
    - Completed SOW 2 template





# RFP OFM 16-1900

## Rate Card

# Strategic Partner Rate Card

## 4.4.2 Rate Card (MS)

- Predictable pricing for duration of the Program (ten year rate card)
- **Not to exceed rate** per experience level
- Escalations for inflation allowed
- Fixed fee/deliverable based pricing
- Statement of Work pricing will use rate card (not scored)

Sample Rate Card Not to Exceed Rates				
Level	Year 1	Year 2	Year 3	Etc.
Leadership	\$\$\$	\$\$\$ +	\$\$\$ ++	-
Senior	\$\$\$	\$\$\$ +	\$\$\$ ++	-
Experienced	\$\$	\$\$ +	\$\$ ++	-
Junior	\$	\$ +	\$ ++	-



# RFP OFM 16-1900

## Evaluation Process



# Proposal Evaluation Process

## 6 Steps in the Selection Process in 4 Phases

- Administrative Review (pass/fail)



- Technical Review
- Pricing Review

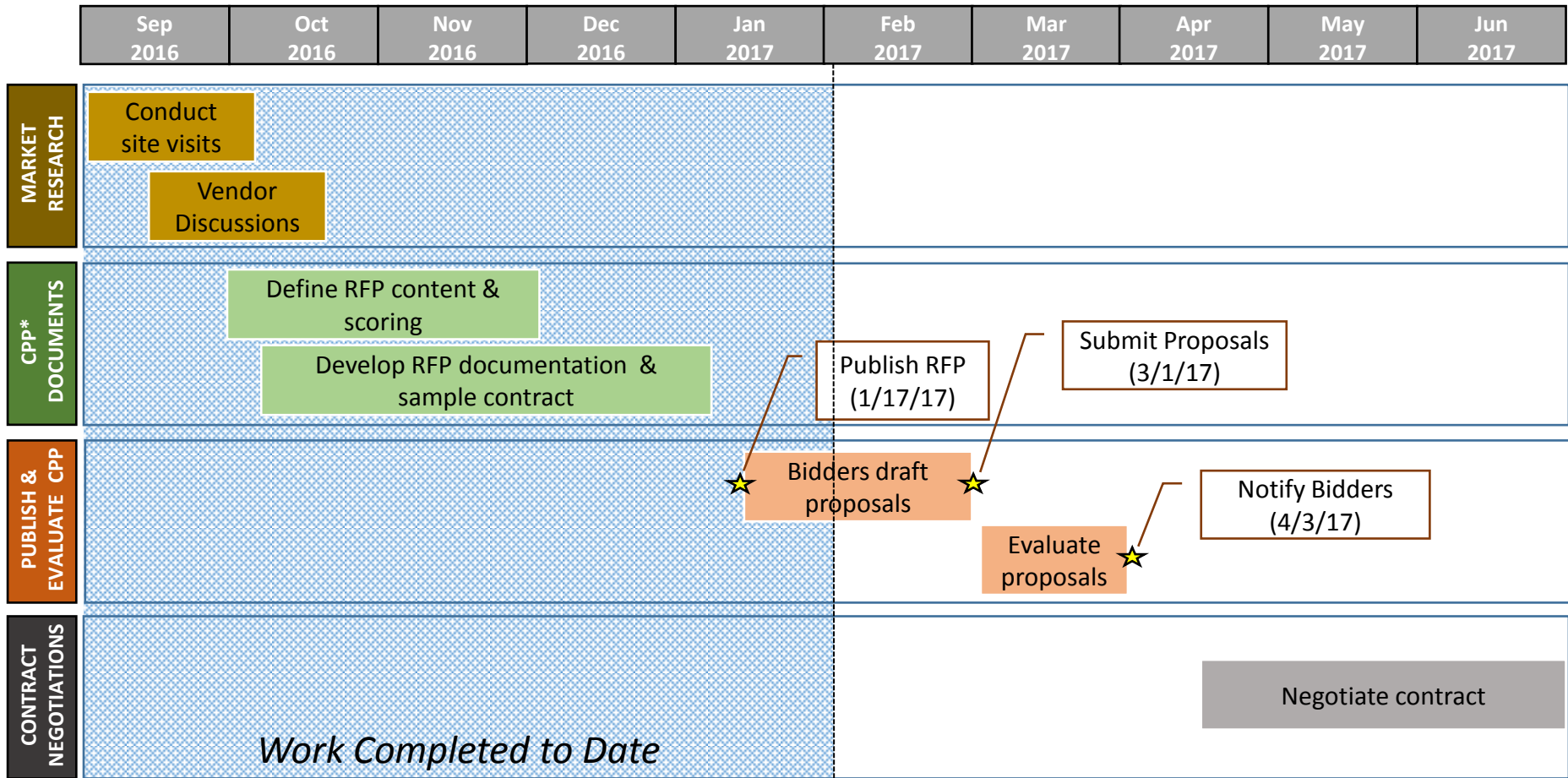


- Presentations / Interviews
- Reference Checks



- SCOR (Strengths, Challenges, Opportunities, Risks)
  - Qualitative evaluation of the experience, capabilities, approach, and fit of each Bidder.

# Procurement Timeline





# Bidder Questions

