

## STANDARD AGREEMENT FORM FOR TASK ORDER PROCUREMENT SYSTEM (TOPS)

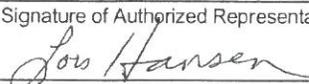
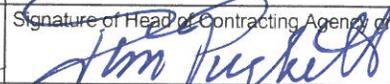
1. TOPS Contract Number 0042-02-13-010	2. DGS Solicitation Number <b>2012-0200-0879</b>	3. Financial Coding	4. Agency Assigned Encumbrance Number
5. Vendor Number 92-0131155	6. Project/Case Number	7. Alaska Business License Number 116276	

This contract is between the State of Alaska,

8. Department of Administration	Division of DRB	hereafter the State, and	
9. Contractor Resource Data, Inc. <span style="float: right;">hereafter the Contractor.</span>			
Mailing Address 1205 East International Airport Road #100	City Anchorage	State AK	ZIP+4 99518

10. **ARTICLE 1. Appendices:** Appendices referred to in this contract and attached to it are considered part of it.
- ARTICLE 2. Performance of Service:**
- 2.1 Appendix A (General Provisions), Articles 1 through 18, governs the performance of services under this contract.
  - 2.2 Appendix B sets forth the liability and insurance provisions of this contract.
  - 2.3 Appendix C sets forth the services to be performed by the contractor.
- ARTICLE 3. Period of Performance:** The period of performance for this contract begins 9/24/12 and ends 11/23/12
- ARTICLE 4. Considerations:**
- 4.1 In full consideration of the contractor's performance under this contract, the State shall pay the contractor a sum not to exceed the **Total Cost** shown on TOPS Cost Proposal #0042-02-13-01. Payment shall be made upon receipt and approval of detailed invoice(s) by the State of Alaska Project Manager indicated on TOPSRequest #0042-02-13.
  - 4.2 When billing the State, the contractor shall refer to the TOPS Contract Number and send the billing to the contact listed under **Requesting Agency Information** on TOPS Request #0042-02-13.

11. **CERTIFICATION:** I certify that the facts herein and on supporting documents are correct, that this voucher constitutes a legal charge against funds and appropriations cited, that sufficient funds are encumbered to pay this obligation, or that there is a sufficient balance in the appropriation cited to cover this obligation. I am aware that to knowingly make or allow false entries or alternations on a public record, or knowingly destroy, mutilate, suppress, conceal, remove or otherwise impair the verity, legibility or availability of a public record constitutes tampering with public records punishable under AS 11.56.815-.820. Other disciplinary action may be taken up to and including dismissal.

<b>12. CONTRACTOR</b>		<b>13. CONTRACTING AGENCY</b>	
Resource Data, Inc		Department/Division Administration / DRB	
Signature of Authorized Representative 	Date 9/26/12	Signature of Head of Contracting Agency or Designee 	Date 9/26/12
Typed or Printed Name of Authorized Representative Lois Hansen		Typed or Printed Name Jim Puckett	
Title Director of Business Administration		Title Director, Retirement and Benefits	

**NOTICE:** This contract has no effect until signed by the head of contracting agency or designee.

## APPENDIX A GENERAL PROVISIONS

### **Article 1. Definitions.**

- 1.1 In this contract and appendices, "Project Director" or "Agency Head" or "Procurement Officer" means the person who signs this contract on behalf of the Requesting Agency and includes a successor or authorized representative.
- 1.2 "State Contracting Agency" means the department for which this contract is to be performed and for which the Commissioner or Authorized Designee acted in a signing this contract.

### **Article 2. Inspection and Reports.**

- 2.1 The department may inspect, in the manner and at reasonable times it considers appropriate, all the contractor's facilities and activities under this contract.
- 2.2 The contractor shall make progress and other reports in the manner and at the times the department reasonably requires.

### **Article 3. Disputes.**

- 3.1 Any dispute concerning a question of fact arising under this contract which is not disposed of by mutual agreement shall be decided in accordance with AS 36.30.620-632.

### **Article 4. Equal Employment Opportunity.**

- 4.1 The contractor may not discriminate against any employee or applicant for employment because of race, religion, color, national origin, or because of age, disability, sex, marital status, changes in marital status, pregnancy or parenthood when the reasonable demands of the position(s) do not require distinction on the basis of age, disability, sex, marital status, changes in marital status, pregnancy, or parenthood. The contractor shall take affirmative action to insure that the applicants are considered for employment and that employees are treated during employment without unlawful regard to their race, color, religion, national origin, ancestry, disability, age, sex, marital status, changes in marital status, changes in marital status, pregnancy or parenthood. This action must include, but need not be limited to, the following: employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training including apprenticeship. The contractor shall post in conspicuous places, available to employees and applicants for employment, notices setting out the provisions of this paragraph.
- 4.2 The contractor shall state, in all solicitations or advertisements for employees to work on State of Alaska contract jobs, that it is an equal opportunity employer and that all qualified applicants will receive consideration for employment without regard to race, religion, color, national origin, age, disability, sex, marital status, changes in marital status, pregnancy or parenthood.
- 4.3 The contractor shall send to each labor union or representative of workers with which the contractor has a collective bargaining agreement or other contract or understanding a notice advising the labor union or workers' compensation representative of the contractor's commitments under this article and post copies of the notice in conspicuous places available to all employees and applicants for employment.
- 4.4 The contractor shall include the provisions of this article in every contract, and shall require the inclusion of these provisions in every contract entered into by any of its subcontractors, so that those provisions will be binding upon each subcontractor. For the purpose of including those provisions in any contract or subcontract, as required by this contract, "contractor" and "subcontractor" may be changed to reflect appropriately the name or designation of the parties of the contract or subcontract.
- 4.5 The contractor shall cooperate fully with State efforts which seek to deal with the problem of unlawful discrimination, and with all other State efforts to guarantee fair employment practices under this contract, and promptly comply with all requests and directions from the State Commission for Human Rights or any of its officers or agents relating to prevention of discriminatory employment practices.
- 4.6 Full cooperation in paragraph 4.5 includes, but is not limited to, being a witness in any proceeding involving questions of unlawful discrimination if that is requested by any official or agency of the State of Alaska; permitting employees of the contractor to be witnesses or complainants in any proceeding involving questions of unlawful discrimination, if that is requested by any official or agency of the State of Alaska; participating in meetings; submitting periodic reports on the equal employment aspects of present and future employment; assisting inspection of the contractor's facilities; and promptly complying with all State directives considered essential by any office or agency of the State of Alaska to insure compliance with all federal and State laws, regulations, and policies pertaining to the prevention of discriminatory employment practices.
- 4.7 Failure to perform under this article constitutes a material breach of the contract.

### **Article 5. Termination.**

The Project Director, by written notice, may terminate this contract, in whole or in part, when it is in the best interest of the State. The State is liable only for payment in accordance with the payment provisions of this contract for services rendered before the effective date of termination.

### **Article 6. No Assignment or Delegation.**

The contractor may not assign or delegate this contract, or any part of it, or any right to any of the money to be paid under it, except with the written consent of the Project Director and the Agency Head.

### **Article 7. No Additional Work or Material.**

No claim for additional services, not specifically provided in this contract, performed or furnished by the contractor, will be allowed, nor may the contractor do any work or furnish any material not covered by the contract unless the work or material is ordered in writing by the Project Director and approved by the Agency Head.

### **Article 8. Independent Contractor.**

The contractor and any agents and employees of the contractor act in an independent capacity and are not officers or employees or agents of the State in the performance of this contract.

**Article 9. Payment of Taxes.**

As a condition of performance of this contract, the contractor shall pay all federal, State, and local taxes incurred by the contractor and shall require their payment by any Subcontractor or any other persons in the performance of this contract. Satisfactory performance of this paragraph is a condition precedent to payment by the State under this contract.

**Article 10. Ownership of Documents.**

All designs, drawings, specifications, notes, artwork, and other work developed in the performance of this agreement are produced for hire and remain the sole property of the State of Alaska and may be used by the State for any other purpose without additional compensation to the contractor. The contractor agrees not to assert any rights and not to establish any claim under the design patent or copyright laws. The contractor, for a period of three years after final payment under this contract, agrees to furnish and provide access to all retained materials at the request of the Project Director. Unless otherwise directed by the Project Director, the contractor may retain copies of all the materials.

**Article 11. Governing Law.**

This contract is governed by the laws of the State of Alaska. All actions concerning this contract shall be brought in the Superior Court of the State of Alaska.

**Article 12. Conflicting Provisions.**

Unless specifically amended and approved by the department of Law the General Provisions of this contract supersede any provisions in other appendices.

**Article 13. Officials Not to Benefit.**

Contractor must comply with all applicable federal or State laws regulating ethical conduct of public officers and employees.

**Article 14. Covenant Against Contingent Fees.**

The contractor warrants that no person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee except employees or agencies maintained by the contractor for the purpose of securing business. For the breach or violation of this warranty, the State may terminate this contract without liability or in its discretion deduct from the contract price or consideration the full amount of the commission, percentage, brokerage or contingent fee.

**Additional Terms and Conditions**

**Article 15. Limitation of Liability.**

Excluding liability for personal injury, property damage and patent or trademark infringement of any claim applicable under Appendix B, Article 1, contractor's liability arising out of this contract and the state's sole and exclusive remedy for any damages arising out of the state's use of the product or services, shall be limited to the state's direct damages, (not including loss of, or damage to, information or data from any cause; or any indirect, incidental, special, punitive, or consequential damages ) but in no event, shall exceed the greater of \$100,000 or the total amount paid to the contractor on the task order from which the liability directly arose. Contractor will not be liable for delays or failure in performance due to causes beyond its control or for damages caused by the state's failure to perform its responsibility.

**Article 16. Special Task Order Terms and Conditions.**

The parties understand and acknowledge that there may be a need to address unique or unanticipated circumstances arising in connection with a particular task order that are within the scope of this contract, but not specifically addressed under this contract. Nothing in this contract shall be construed to preclude the contractor or state from proposing reasonable additional terms and conditions for a task order, consistent with this contract, to resolve any such issues. The parties further agree to negotiate expeditiously and in good faith to achieve resolution of these matters.

**Article 17. Ownership of Intellectual Property.**

In no case shall the state, its departments, subsidiaries or assigns at any time hold any rights to title or ownership of any preexisting intellectual property and copyrighted materials; licensed software or licensed applications, tools documentation, technical expertise or know-how provided by contractor under this contract. All use of said licensed products shall be governed by the terms and conditions of the software license agreement in place between the parties. Contractor shall have the right to use its products, tools, know-how on other efforts without the prior approval of the department. Contractor shall obtain the approval of the department prior to using materials covered by Article 10 outside of this agreement.

**Article 18. Warranties and Disclaimer.**

The contractor warrants that the services will meet the contracting agency's requirements set out in the specifications. The contractor does not warrant that the system will meet the contracting agency's requirements not expressed in the specifications. Requirements not reasonably inferred from the specifications are specifically disclaimed by the contractor.

## **APPENDIX B<sup>1</sup>**

### **INDEMNITY AND INSURANCE**

#### **Article 1. Indemnification**

The Contractor shall indemnify, hold harmless, and defend the contracting agency from and against any claim of, or liability for error, omission or negligent act of the Contractor under this agreement. The Contractor shall not be required to indemnify the contracting agency for a claim of, or liability for, the independent negligence of the contracting agency. If there is a claim of, or liability for, the joint negligent error or omission of the Contractor and the independent negligence of the Contracting agency, the indemnification and hold harmless obligation shall be apportioned on a comparative fault basis. "Contractor" and "Contracting agency", as used within this and the following article, include the employees, agents and other contractors who are directly responsible, respectively, to each. The term "independent negligence" is negligence other than in the Contracting agency's selection, administration, monitoring, or controlling of the Contractor and in approving or accepting the Contractor's work.

#### **Article 2. Insurance**

Without limiting Contractor's indemnification, it is agreed that Contractor shall purchase at its own expense and maintain in force at all times during the performance of services under this agreement the following policies of insurance. Where specific limits are shown, it is understood that they shall be the minimum acceptable limits. If the Contractor's policy contains higher limits, the state shall be entitled to coverage to the extent of such higher limits. Certificates of Insurance must be furnished to the Contracting Officer prior to beginning work and must provide for a 30-day prior notice of cancellation, nonrenewal or material change of conditions. Failure to furnish satisfactory evidence of insurance or lapse of the policy is a material breach of this contract and shall be grounds for termination of the Contractor's services. All insurance policies shall comply with, and be issued by insurers licensed to transact the business of insurance under AS 21.

**2.1 Workers' Compensation Insurance:** The Contractor shall provide and maintain, for all employees engaged in work under this contract, coverage as required by AS 23.30.045, and; where applicable, any other statutory obligations including but not limited to Federal U.S.L. & H. and Jones Act requirements. The policy must waive subrogation against the State.

**2.2 Commercial General Liability Insurance:** covering all business premises and operations used by the Contractor in the performance of services under this agreement with minimum coverage limits of \$300,000. combined single limit per occurrence.

**2.3 Commercial Automobile Liability Insurance:** covering all vehicles used by the Contractor in the performance of services under this agreement with minimum coverage limits of \$300,000. combined single limit per occurrence.

**APPENDIX C  
SCOPE OF WORK**

This contract incorporates the following documents by reference:

- **TOPS Request #0042-02-13;**
- **TOPS Response / Cost Proposal #0042-02-13-01.**

In case of conflict, the following order of precedence shall govern:

1. This contract document;
2. TOPS Request #0042-02-13;
3. TOPS Response / Cost Proposal #0042-02-13-01.

Any scope clarifications and/or negotiations that would not have the effect of changing the ranking of responses may be included below (or on additional pages, if necessary):

Larry Walsh, DRB IT Manager and Lois Hansen from RDI discussed beginning and ending date to insure staff availability and final deliverables. These dates are reflected in article 3 of this Standard Agreement.

**APPENDIX D**  
**PAYMENT FOR SERVICES**

Payment for services provided under this contract shall not exceed **\$13,200**.for the period of performance of this contract.

The contractor shall be paid a rate of **\$110** an hour.

The Contractor will submit detailed invoice(s) for services performed in accordance with Appendix C. The State will pay all invoices within thirty (30) days of invoice approval by the Project Director.

Each invoice must:

- reference the Contractor's name, address and phone number
- reference the contract number.
- include an invoice number
- reference the Division for which the services are being provided
- itemize the contractual services provided

The Contractor shall submit invoices to the address specified below no later than 30 days after the end of each month for which services were performed. Failure to include the required information on the invoice may cause an unavoidable delay to the payment process.

Address invoice to:  
AK Dept of Administration  
Div. of Retirement & Benefits  
PO Box 110203  
Juneau, AK 99811-020302

Invoice Delivery:

Invoices should be emailed to [Larry.Walsh@alaska.gov](mailto:Larry.Walsh@alaska.gov)

Notwithstanding any other provision of this contract, it is understood and agreed that the State shall withhold payment at any time the Contractor fails to perform work as required under Appendix C and/or D of this contract.

**COST PROPOSAL**

Cost proposal must include all costs required to perform the work as described, including but not limited to travel costs, labor, overhead, etc. **BOTH HOURLY RATE AND EST # OF HOURS MUST BE COMPLETED FOR YOUR PROPOSAL TO BE RESPONSIVE.**

If additional unanticipated work is required after TO contract award, it shall be performed at the hourly rate quoted below. All proposed individual resources and subcontractors are subject to the approval of the TO Manager. Any change in individual resources or sub-contractors after award will require approval by the Agency Project Manager.

To ensure the optimum use of public funds, the state will review cost reasonableness in the following manner:

1. If any response has a cost proposal that is 50% or greater above or below the average cost of all responses, the state reserves the right to not consider that response. (Ex: Given an average cost of \$10,000, responses with cost proposals \$15,000 and higher or \$5,000 and lower may be rejected.)
2. **BEST VALUE:** If the highest ranked vendor's cost proposal is 10% or more greater than the second highest ranked vendor's cost proposal, the state reserves the right to make award to the second highest ranked vendor.
3. **LOW PRICE:** Past Performance Information (PPI) shall be applied to your Total Cost as a percentage reduction equivalent to your current PPI score for evaluation purposes. (Ex: If your current PPI score is 5, your Total Cost will be reduced by 5% when comparing to other costs.)

**COST**

Hourly Rate		Est. # Hours		Total Cost
\$ 110.00	x	120	=	\$13,200.00

<b>ETS Fee (\$300 + .5% of Total Cost)</b>	\$ 366.00
<b>Total TO Cost</b>	<b>\$13,566.00</b>

**PROPOSED INDIVIDUAL RESOURCES**

Nicholas St. Gabriel	Jeff Ober	Grant Ficek
Michael Brameld		

**PROPOSED SUB-CONTRACTORS**

Name	Description of Work	% of Overall Work

**VENDOR INFORMATION**

Vendor Name: Resource Data, Inc. (RDI)

By checking this box, I, Howard Earl for Resource Data, Inc. (RDI), represent that I am authorized to and do bind the vendor to this response. I certify that all of the information provided herein is true and accurate, to the best of my knowledge. I understand that the discovery of deliberately misrepresented information contained herein may constitute grounds for contract termination and removal from the vendor pool.

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**GENERAL INSTRUCTIONS**

Vendors must use the template set out herein for submission of their response to a TOPS Request Form, including 10-point Arial font. Modifications to the format of this template (e.g., altering font size, altering font type, adding colors, adding pictures etc) will result in the rejection of your response.

Other than as requested on this page, your response must be "cleansed" of any identifying names or information. **Do not list any names/information in Project Approach, Risk Assessment, or Experience/Qualifications that can be used to identify your firm. The inclusion of identifying information may result in your response being rejected.**

**PROJECT APPROACH**

Provide a concise and detailed summary of your approach to delivering the services described in the TOPS Request Form. The summary must demonstrate your understanding of how to successfully complete the work in a way that meets the state's needs.

**Project Approach cannot exceed one page.**

**RISK ASSESSMENT**

Itemize potential **controllable** and **non-controllable** risks associated with providing the services described in the TOPS Request Form and concisely describe how you will mitigate each risk.

**Risks cannot exceed one page. You may add/delete additional rows to identify additional risks and solutions, but do not exceed the page limit. Do not include any cost or marketing information.**

**EXPERIENCE/QUALIFICATIONS**

Describe your experience and qualifications specifically as they pertain to the services described in the TOPS. Do not include names or information that can be used to identify your firm or the proposed resource(s).

**Experience/Qualifications cannot exceed two pages.**

**PROJECT APPROACH**

**BEST VALUE PROCESS ONLY:** EVALUATOR NAME:

SCORE: 10 5 0

The Department of Administration Division of Retirement and Benefits (DRB) recently commissioned Buck Consultants to provide a Technology Roadmap for keeping up with an expected 64% increase in workload over the next decade. In response to the Technology Roadmap, Oracle Corporation has provided DRB with a proposal for installing a COTS web portal, hardening infrastructure, and improving disaster recovery preparedness and data security.

The purpose of this task order is to perform an independent verification and validation of Oracle's proposal, including strategies, technologies, and costs/benefits. To meet this need, our firm will provide a highly experienced project team to perform a thorough gap analysis of the Oracle proposal to determine its viability in meeting the needs laid out by Buck Consultants. The final analysis will provide insight into all areas of the proposal, including technical issues, financial concerns, licensing, and competitiveness.

The project will progress in three stages in a straightforward manner. Our Project Manager will provide the designated DRB Project Manager with weekly status updates. Additionally, we offer clients continuous access to our business system (e.g., timesheets, costs, issue tracking) to avoid scope, cost, or schedule surprises.

#### PHASE 1—INFORMATION GATHERING

The project team, headed by a Technical Lead/Project Manager, will gather all necessary materials from DRB. At a minimum, our team will require the Buck Consultants Technology Roadmap and the Oracle proposal. Additional materials such as system diagrams, system descriptions, and entity relationship diagrams (ERDs) may be requested if they are referenced in the proposal or if they will benefit the gap analysis effort.

#### PHASE 2—RESEARCH, DRAFT GAP ANALYSIS

The project team will research the materials at hand and formulate the gap analysis. Research completed during this phase will achieve the following goals:

- Compare costs (e.g., licensing costs) between Oracle products and similar vendors
- Compare DRB user bases to other user bases
- Extract specific recommendations from the Technology Roadmap to create a matrix that measures the Oracle proposal against the requirements listed in the roadmap

Phase 2 will be the longest phase of the project. We will provide a draft of the analysis document to the DRB Project Manager for review.

#### PHASE 3—FINAL VERSION

The project team will create a final version of the gap analysis document based on DRB's feedback, formatting conventions, and needs for future document use. The project team will present the DRB Project Manager with a final version of the gap analysis document, which the DRB can use for work outside of this specific task order.

### RISK ASSESSMENT

BEST VALUE PROCESS ONLY: EVALUATOR NAME:

SCORE: 10 5 0

RISK: Lack of materials

WHY IT IS A RISK: Failure to receive requested materials in a timely manner may result in an incomplete analysis.

OUR SOLUTION: Our Project Manager will identify needed materials and use an approach of constant communication with the DRB project team and contractors to ensure that lists of outstanding issues and materials stay at the forefront of the project priorities. Additionally, the final version of the gap analysis document will detail any missing materials and the assumptions made.

RISK: Lack of communication

WHY IT IS A RISK: Lack of communication can cause projects to fail.

OUR SOLUTION: In addition to providing weekly status reports, we will hold short, informal status meetings between our Project Manager and the DRB Project Manager on a weekly basis to discuss the progress that has been made on the project, remaining tasks, and any issues that are impeding progress.

RISK: Lack of availability of key DRB personnel

WHY IT IS A RISK: The analysis effort requires input from DRB staff. If key DRB personnel are not available, the project progress could suffer.

OUR SOLUTION: We mitigate this risk by planning for periods of unavailability as far in advance as possible. Plans can include lengthening or shortening sprints, having backups for key personnel, or a combination of techniques.

RISK: Lack of availability of contractor staff

WHY IT IS A RISK: If contractor staff is not available, the project schedule, scope, and success will suffer.

OUR SOLUTION: Our firm uses a proprietary tool designed specifically to solve this problem and ensure that our team members are available for the hours stated in the TOPS Request.

**EXPERIENCE/QUALIFICATIONS**

**BEST VALUE PROCESS ONLY:** EVALUATOR NAME:

SCORE: 10 5 0

**COMPANY QUALIFICATIONS**

1. Our firm has implemented numerous critical projects for various State agencies, providing services ranging from requirements gathering and project management to design, development, testing, and implementation. Our work includes critical projects such as the online PFD application and myAlaska development and integration.
2. We have provided evaluation services and requirements gathering for a variety of private sector projects and State projects such as the Department of Revenue's Data Entry and Examination (DEX) application to improve tax return processing, and the Department of Labor and Workforce Development's Workforce Investment Performance System (WIPS).
3. Our firm has been at the forefront of database technologies for the last 25 years and has been providing clients with robust and efficient database designs, implementations, and warehouses. We employ more than 60 Oracle experts.
4. We have supported clients on a number of large enterprise content management system development and implementation efforts. Throughout all of these efforts, we have been able to leverage many of our talented project managers and analysts to identify and document requirements, manage the entire scope of the project, and deliver hugely important systems on time.

**STAFF QUALIFICATIONS**

Our proposed Project Manager has over ten years of experience in IT, including extensive experience with Oracle SQL and PL/SQL programming, over nine years of experience doing analysis work in the IT world, and a Master's Degree in Information Systems. His recent experience with Oracle products and technologies includes database support and maintenance for the Pacific States Marine Fisheries Commission. Previous project work includes work as an Oracle DBA and work with Oracle Content Management, Oracle Forms, Oracle HTMLDB (Apex), Oracle Reports, and other Oracle Middleware components.

Our proposed Lead Analyst has over 20 years of experience in IT and a Master's Degree in Information Systems. He has been heavily involved in business analysis and defining business processes for applications for major Department of Revenue projects.

To support our Project Manager and Lead Analyst, our firm will provide a team of analysts with strong skills in technical evaluation and Oracle technologies. One of these analysts spent 12 years in the US Air Force as an enlisted computer programmer and worked on several major projects for the US Air Force and NATO using a range of technologies including Oracle databases, Oracle Forms & Reports, Perl, and Java. The other analyst has recent experience using Oracle technologies to implement and utilize database tools, as well as experience on a recent project that required a detailed analysis of application submittal and review workflows for the Department of Economic Conservation

**RELEVANT EXPERIENCE****DEPARTMENT OF LABOR: WORKFORCE INVESTMENT PERFORMANCE SYSTEM**

Our firm provided expert-level project management for the Alaska Department of Labor and Workforce Development's Workforce Investment Performance System (WIPS) project. We also led the analysis and design effort and managed a diverse set of development teams, using agile methodologies to allow us to deliver working software that could be repeated, vetted, and improved by client input. The project involved four implementation phases: a new fiscal system (SAGE), a grants management system (EGrAMS), a case management system (ICM) written using CRM, and data warehouse/reporting system. We performed the following high-level tasks successfully:

- Gathered requirements
- Wrote architecture and project planning documents
- Facilitated vendor selection
- Managed each phase of project development and implementation,
- Led all testing and deployment teams

**EXPERIENCE/QUALIFICATIONS (CONT.)**

**REGULATORY COMMISSION OF ALASKA: E-GOVERNMENT CASE MANAGEMENT SYSTEM**

The Regulatory Commission of Alaska (RCA) is responsible for regulating public utilities and ensuring that they provide adequate services at reasonable rates. Extensive public interaction is required. Our firm assisted the RCA in selecting and implementing a web-based enterprise CMS. We created process flows for RCA's existing business processes based on Alaska Statutes and Regulations and meetings with RCA staff. Using the information learned while developing the business processes, we identified and documented functional requirements for a CMS.

We assisted in developing the RFP for the CMS and in evaluating vendor responses. We also worked with RCA staff to define new business processes and system configurations for the CMS. We evaluated proposed test cases and performed test cases for each release of the CMS. We developed use cases and prototypes of a new web portal for the RCA using RCA business principles and input from site users for guidance on content and functionality. We tested website functionality prior to each release and wrote user help manuals. We also assisted developers in identifying data relationships in the CMS from a business perspective, and assisted users of the CMS and website during initial implementation, including performing training and advanced troubleshooting.

**STATE OF ALASKA AUTHENTICATION SYSTEM**

Over the last several years, our firm has been engaged in developing agency applications that have made use of the existing myAlaska framework. Included in this list are the Department of Environmental Conservation's Online Permitting and Licensing Application (now referred to as OASys), the Department of Revenue's Online Tax Information System (OTIS), the Department of Labor's Adult Basic Education System, and several others. Each of these development efforts has required extensive interaction with myAlaska technical staff and helped us develop an intimate knowledge of the inner workings of myAlaska from an integrators perspective.

**EVALUATOR NON-CONFLICT OF INTEREST STATEMENT**

By checking this box, I certify that neither I, \_\_\_\_\_, nor any member of my immediate family has a material personal or financial relationship with this vendor or to a direct competitor of this vendor. I further certify that no other relationship, bias or ethical conflict exists which will prevent me from evaluating this response solely on its merits and in accordance with the evaluation criteria.

Furthermore, I agree to notify the Task Order Manager if my personal or financial relationship with this vendor is altered at any time during the evaluation process. If I am serving as the Procurement Officer of record I agree to advise my supervisor of any changes that could appear to represent a conflict of interest.

**EVALUATOR NOTES**

To be completed by requesting agency evaluator(s).

Comments **MUST** be recorded for any section receiving a Best Value score of 10 or 0. Comments must be concise and objective and refer to or quote the portion of the response that led to the score.

<b>PROJECT APPROACH</b>

<b>RISK ASSESSMENT</b>

<b>EXPERIENCE/QUALIFICATIONS</b>

**TASK ORDER REQUEST FORM**

Complete all applicable sections and e-mail to: [doa.taskorders@alaska.gov](mailto:doa.taskorders@alaska.gov)

**REQUESTING AGENCY INFORMATION**

Department: 02 - Administration  
 Division/Section: DRB  
 Billing Contact: Tim Adair Ph #: 465.4466 E-mail: tim.adair@alaska.gov  
 CC / LC: Disaster Recover CIP funds spread

**TASK ORDER INFORMATION**

**Solicitation Type:**  **Best Value**  **Low Price**  
**Cost Type:**  **Fixed Fee**  **Time & Materials: 120 est # of hours**  
**Response Deadline:** 9/17/2012  
*If Task Order is expected to be \$50,000 or under, circulation period must be at least 3 business days. If over \$50,000, circulation period must be at least 5 business days.*  
 Project Title: IV&V of DRB System Upgrade  
 Project Manager: Larry Walsh Ph #: 465.3591 E-mail: larry.walsh@alaska.gov  
 Category: 4: Data Center Consulting  
 Start Date: 9/24/2012 Project Estimate: \$15,000  **NTE**  
 End Date: 11/15/2012  
 Location of Work: Juneau, Alaska or remotely  **No Preference**

**VENDOR SELECTION**

*(Only complete if Not to Exceed is \$50,000 or less)*

Vendor #1: World Wide Technologies

Vendor #2: Resource Data, Inc.

Vendor #3: Alaska IT Group

More vendors may be included on an additional sheet.

**IT STANDARDS**

All work on any contract awarded as a result of this task order must be in compliance with state and federal requirements, including but not limited to the state information technology and telecommunication security policies and Technology Management Council (TMC) standards.

The state telecommunication and information technology security policies can be located at: [security.alaska.gov](http://security.alaska.gov)

The TMC standards can be located at: [www.state.ak.us/local/akpages/ADMIN/info/plan/standards.shtml](http://www.state.ak.us/local/akpages/ADMIN/info/plan/standards.shtml)

Both can be downloaded by any authenticated state employee.

**DEPARTMENT APPROVAL**

I, Jim Pucket, Director DRB, represent that I am authorized to and do bind the Department to this request and certify that this Task Order is in compliance with the Department's IT Plan, the Statewide IT Plan and the IT Standards, and is in the best interest of the state.

**BACKGROUND**

The Department of Administration Database Standard is Oracle. The Division of Retirement and Benefits (DRB) is an Oracle/Java shop with an existing investment in Oracle hardware, storage, database and imaging infrastructure. DRB is entertaining a proposal from Oracle to take the next step in its Information Technology by implementing a Commercial Off the Shelf (COTS) web portal to automate manual tasks through workflows and increase the availability of self-service for the Division's customers, partners and employees. The proposal also includes recommendations for infrastructure hardening, disaster recovery preparedness, data security and other steps DRB could take to simplify and secure its information technology environment, while leveraging and expanding on its existing technology investment.

DRB anticipates a 64% increase in retirees over the next decade and this proposal was developed at its request to prepare for, meet and keep up with this expanding workload without materially increasing its workforce.

DRB previously commissioned Buck Consultants to review and evaluate its organization. Buck published a DRB Assessment and Roadmap in February 2012. Buck's technology recommendations were considerable and make up the Technology Roadmap for DRB. This information is available upon request.

The Division wants an independent verification and validation of the Oracle proposal, including strategies, technologies, and costs/benefits.

**SCOPE / STATEMENT OF WORK**

Working closely with the DRB Project Manager the contractor will review Oracle's Enterprise Content Management analysis and subsequent implementation proposal, evaluate the proposed strategies, technologies and the cost/benefit analysis along with the cost proposal for market competitiveness and technical applicability within the Division's current infrastructure and technical roadmap. The work product will be a report evaluating the proposal from a technical and financial perspective addressing the technologies proposed, licenses required and the competitiveness of the pricing.

**SPECIAL EXPERTISE & EXPERIENCE**

Familiarity with Oracle database, Enterprise Content Management and Fusion Middleware technologies. Ability to evaluate financial and technical proposals and discuss their strengths and weaknesses.

**SPECIAL CONSIDERATIONS OR CONSTRAINTS**

Vendor must be knowledgeable of Oracle technologies, products and strategies. Vendor must also be able to operate independently, must be a separate entity from Oracle, and must be able to execute a non-disclosure agreement with all parties to be considered for this engagement.

## TASK ORDER REQUEST FORM INSTRUCTIONS

### HEADER INFORMATION

The Task Order # will be assigned by the Task Order Manager. Please do not otherwise assign your own number to this form.

### REQUESTING AGENCY INFORMATION

Enter agency-specific information as required.

1. Department: Select your department from the dropdown box.
2. Division/Section: Your division and section names.
3. Billing Contact: The name and contact info that invoices related to this Task Order will go to.
4. CC/LC: The collocation/ledger code that the task order will be billed against.

### TASK ORDER INFORMATION

Enter information regarding this task order.

1. Solicitation Type: Select which solicitation method to use for this Task Order.
  - **Best Value** will be awarded to the responsive and responsible vendor with the most advantageous response, considering project approach and risk assessment, experience and qualifications, Past Performance Information (PPI), and cost. Each of these four evaluation criteria are weighted equally at 25%.
  - **Low Price** will be awarded to the responsive and responsible vendor with the lowest price after the price has been reduced by a percentage equal to the vendor's PPI score for evaluation purposes.
2. Cost Type: Flat Fixed Fee or Time & Materials. If Time & Materials, must enter estimated number of hours needed. This will be used by the vendors in their Cost Proposal.
3. Response Deadline: If Task Order is expected to be \$50,000 or under, this must be at least 3 business days, otherwise the response deadline must be at least 5 business days. These are minimums and a later date may be entered.
4. Project Manager: Enter the agency Project Manager name and phone number. This will be the point of contact for all project-specific inquiries.
5. Category: Select the category number that this Task Order generally falls into. Category definitions can be found at:  
<http://doa.alaska.gov/ets/taskorder/>
6. Start/End Dates: Enter the anticipated start and end dates for the Task Order.
7. Project Estimate: Enter the estimated cost of the project. If "NTE" (Not to Exceed) is checked, any cost proposals above this amount will be rejected as non-responsive.
8. Location of Work: Indicate where work should take place. Check "No Preference" if remote work is allowable. All work must be performed within the United States or Canada.

### VENDOR SELECTION

If the Task Order is expected to be \$50,000 or under, the requesting agency may select a minimum of **three** vendors from the Vendor Pool to solicit responses from. **Do not select vendors you know cannot or will not respond in order to ensure a single response** – doing so may result in a procurement violation investigation and related disciplinary measures.

### DEPARTMENT APPROVAL

Indicate your department's approval (IT, fiscal, and procurement) by entering the final approver's name and checking the box. **It is your agency's responsibility to ensure all internal approvals are obtained prior to submitting this form to the Task Order Manager.** Neither the Task Order Manager nor the Department of Administration assume any responsibility for an agency's failure to obtain proper internal approval.