

STATE OF ALASKA

AUTHORITY TO SEEK PROFESSIONAL SERVICES

1. Agency Reference Number <i>0073-07-13-010</i>
2. Date Required for Service Execution

If required by the State Administrative Manual, this form must be executed prior to seeking PROFESSIONAL SERVICES CONTRACTS. The completed form must be part of the contract file.

3. Department Labor	Dept. No. 07	4. Division Business Partnerships	Division No.
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5. Service Code(s) <i>7690001</i>	6. Name of Program, Project or Service WIPS Reporting	7. Statutory Authority (If Applicable) n/a
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8. Amount this ASPS \$ <del>0</del> \$50,000	9. Last Total ASPS Amount \$n/a	10. Total Estimated Amount for Project Completion <del>\$0</del> \$50,000
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11. Total Projected Period of Performance (Include All Multi-Year Phases and Optional Renewals) From: 03/07/2013		06/30/13
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12. Phase(s) n/a
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13. Project Director's Name <i>Corine Geldhof</i> Corine Geldhof	Phone 907-465-4890	14. Preparer's Name Paul Hegg	Phone 907-465-5859
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15. Purpose(s) of Contract (Continue on Additional Pages if Necessary) The division of Business Partnerships needs expert level developer assistance in Microsoft Dynamics CRM/XRM to continue to guide us through the first year of fixes, bugs, and enhancements that are occurring.
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If a solicitation effort other than competitive-sealed proposals or small procurement is anticipated, Form 02-100, Request for Alternate Procurement, must be attached and approved by the Department of Administration prior to proceeding with procurement.

CONTRACTING DEPARTMENT

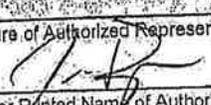
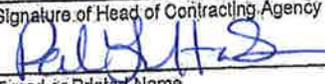
Approval of this Authority is contingent upon use of the 10% evaluation point and the 5% price based Alaskan vendor preference.

16. Department Head/Authorized Representative Name Paloma Harbor	Signature <i>Paloma Harbor</i>
Department Head/Authorized Representative Title ASD Director	Date 3/22/2013

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

1. TOPS Contract Number <b>0073-07-13-010</b>	2. DGS Solicitation Number <b>2012-0200-0879</b>	3. Financial Coding <b>7690001</b>	4. Agency Assigned Encumbrance Number
5. Vendor Number <b>92-0131155</b>	6. Project/Case Number	7. Alaska Business License Number <b>116276</b>	
This contract is between the State of Alaska,			
8. Department of <b>Labor Workforce Development</b>		Division of <b>Business Partnerships</b> hereafter the State, and	
9. Contractor <b>Resource Data Inc.</b>		hereafter the Contractor.	
Mailing Address <b>1206 E International Airport Rd #100</b>		City <b>Anchorage</b>	State ZIP+4 <b>AK 99518</b>
10. <b>ARTICLE 1. Appendices:</b> Appendices referred to in this contract and attached to it are considered part of it.			
<b>ARTICLE 2. Performance of Service:</b>			
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.			
<b>ARTICLE 3. Period of Performance:</b> The period of performance for this contract begins <u>3/26/13</u> and ends <u>6/30/13</u> .			
<b>ARTICLE 4. Considerations:</b>			
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 #0073-07-13-1. Payment shall be made upon receipt and approval of detailed invoice(s) by the State of Alaska Project Manager indicated on TOPS Request #0073-07-13.			
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 #0073-07-13.			

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 alterations 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 11.66.815-.820. Other disciplinary action may be taken up to and including dismissal.

12. CONTRACTOR		13. CONTRACTING AGENCY	
Signature of Authorized Representative 		Signature of Head of Contracting Agency or Designee 	
Date <b>3/20/13</b>	Date <b>3/22/13</b>	Department/Division <b>Labor &amp; Workforce Development / Business Partnerships</b>	
Typed or Printed Name of Authorized Representative <b>Lois Hansen Jim Regoes</b>		Typed or Printed Name <b>Paloma Harbour</b>	
Title <b>Director of Business Administration President</b>		Title <b>Acting ASD Director</b>	

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, 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 #0073-07-13;**
- **TOPS Response / Cost Proposal #0073-07-13-1.**

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

1. This contract document;
2. TOPS Request #0073-07-13;
3. TOPS Response / Cost Proposal #0073-07-13-1.

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):

RDI will provide expert analysis, programming support, and project management to build the Division of Business Partnerships' (DBP) Reporter system.

This will include

- Analysis & Design
- Data warehouse and SQL programming support
- Toolset training for end users
- Project Monitoring

The expectation is that RDI will be managing the task list and implementation schedule under direction from the DBP Product owner.

It is also expected that hardware and software will be provided by DOL's IT department. Managing the set-up and configuration of this reporting and data warehouse software should be a minimal part of RDI's time on this project.

Contract start date will commence on contract signing and end on 6/30/13.

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

Payment for services provided under this contract shall not exceed **\$48,760**, for the period of performance of this contract.

The contractor shall be paid a rate of **\$92** 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 referenced by Deliverable Number

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 Labor & Workforce Development  
Div. of Administrative Services  
1111 W. 8<sup>th</sup> St., Suite 308  
Juneau, AK 99802-1149

Invoice Delivery:

Invoices should be emailed to Paul Hegg .

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.

**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 purpose of this task order is to provide expert-level developer assistance in Microsoft Dynamics CRM/xRM to support the Division of Business Partnerships (DBP) through the first year of bug fixes and enhancements related to the new ICM case management component of the WIPS project.

To help the DBP meet this need, our firm will provide a highly qualified team with years of experience on state government projects and direct experience working with CRM/xRM deployments, including a case management system for a state government. This team will provide as-needed development support and maintenance for bugs to code fixes in CRM.

Our firm specializes in providing as-needed IT services. We have developed such an efficient service delivery model that we can provide professional services ranging from one-hour increments to long-term project teams. Additionally, we use a custom tool designed specifically to support flexible staffing, which we will employ to ensure that our team members are available for the hours stated in the TOPS request.

We recommend using Team Foundation Server (TFS) software to log and track users' enhancement requests and bug reports. A strong product owner sets project priorities and identifies high-level tasks. We will support the ICM product owner during this triage process, and rely on our experience with similar projects to determine which change requests are of high value and priority.

Over the course of the project, developers will unit test their code, resolve any issues discovered during testing, and work with DBP staff to develop a strategy for testing modified functionality. Our Project Manager will assist as needed with workload delegation and status reporting. All of our tasks will be tracked and resolved through TFS.

**RISK ASSESSMENT****BEST VALUE PROCESS ONLY: EVALUATOR NAME:**SCORE:  10  5  0**RISK: Unfamiliarity with project goals and past decisions****WHY IT IS A RISK:** Lack of knowledge of project goals can lead to slowdowns or unnecessary rework by developers.**OUR SOLUTION:** It is essential on all projects to review project goals with the product owner and business experts.~~This review will help set priorities and inform our staff of which requests and enhancements will be promoted for development work.~~**RISK: Unmanaged list of user requests****WHY IT IS A RISK:** An unstructured list of user requests can cause developers to work on items that are low priority or out of scope.**OUR SOLUTION:** We support the concept of having a strong product owner who prioritizes user requests. Regular reviews with product owners reinforce project goals and ensure that developers are working on high-priority items.**RISK: Insufficient or unavallable contractor resources****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. We've used it successfully for millions of dollars of work, and it will ensure that our team members are available for the hours stated in the TOPS request.**RISK: Lack of availablity of key DOL personnel****WHY IT IS A RISK:** Development projects rely heavily on client input. A lack of key personnel can impede the progress of the project.**OUR SOLUTION:** We mitigate this risk by planning for periods of unavallibility as far in advance as possible and having backups for key personnel.**RISK: Lack of availability of necessary infrastructural resources****WHY IT IS A RISK:** Onsite programmer support may require developer workstations, as well as servers to host development, testing, and production environments. While the costs of these resources may not typically be very high, the time it takes to set up and configure these resources is often substantial.**OUR SOLUTION:** We can mitigate this risk by planning ahead, but most mitigation must be performed by DOL, which will be responsible for procuring and installing infrastructure.**RISK: Lack of communication****WHY IT IS A RISK:** Lack of communication can cause projects to fail.**OUR SOLUTION:** In addition to providing regular status reports, we will host status meetings between our project manager and the client project manager. We encourage informal communication daily.

**EXPERIENCE/QUALIFICATIONS****BEST VALUE PROCESS ONLY: EVALUATOR NAME:**SCORE:  10  5  0**COMPANY QUALIFICATIONS**

1. Our firm has a long history of successful projects with state government and has gained a tremendous depth of knowledge of the business practices, systems, and cultures of these clients. Furthermore, our proposed Project Manager has recent direct experience providing testing and project management oversight for a CRM/xRM case management system in a state government setting. This highly relevant experience will ensure that the department's needs are met in an efficient and cost-effective manner.
2. Our proposed developers are Microsoft Certified Professionals (MCPs) with certifications in Microsoft Dynamics CRM 4.0 Customization and Configuration and Microsoft Dynamics CRM 4.0 Applications.
3. We are currently involved in a project to install and configure a Microsoft Dynamics CRM system for a state government agency. This project revolves around managing cases, constituents, and responses for agency staff. This project uses some workflows similar to the ICM project, as well as some innovative additions with the Microsoft Outlook client. Our experience with these new features might be useful to the ICM project. Additionally, this experience with CRM technology ensures that our team will be able to mitigate risk based on prior experience.
4. Our firm has offices in Juneau, Anchorage, and Fairbanks. These locations ensure that our proposed staff are available to work onsite with DOL staff.

**STAFF QUALIFICATIONS**

Our proposed Project Manager has successfully led numerous projects for state and federal agencies. He is an expert in agile (Scrum) methodologies. His recent work includes serving as the lead Project Manager and Analyst for a system that measures the performance of workforce investment. This project has included implementing a grants management system and a case management system using CRM.

To perform the majority of the development work, we will provide two developers with recent experience developing and maintaining CRM systems in state government settings. Our Sr. Programmer/Analyst 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. He is a Microsoft Certified Professional with certification in Microsoft Dynamics CRM 4.0 Customization and Configuration. The second Programmer/Analyst is experienced with a variety of technologies and has been heavily involved in several state government projects, including recent work providing maintenance and bug fixes for a case management system written in CRM.

In addition, we will provide a Sr. Programmer/Analyst with over six years of IT experience as a senior consultant on this project. This team member is a Microsoft Certified Professional Developer (MCPD) specializing in the .NET framework and CRM applications. He has extensive experience working in state government settings.

**RELEVANT EXPERIENCE****SYSTEM to SUPPORT WORKFORCE MANAGEMENT USING CRM CASE MANAGEMENT**

Our firm led the analysis and design effort and provided project management support for a system which measures the performance of workforce investment that involved four implementation phases: a new fiscal system, a grants management system, a case management system written using CRM, and a 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.)****SYSTEM FOR CASE MANGEMENT USING CRM**

A state government agency chose Microsoft Dynamics CRM to replace its current independent systems for its constituent relations, scheduling, boards and commissions, international trade, and communications teams. Our firm is involved in collecting requirements, building prototypes in CRM, and configuring CRM for the specific business needs of the agency's staff. Main project goals include the following:

- Use Microsoft Dynamics CRM to distill business processes
- Create user groups that will provide security access & control
- Build a unified office database point that will be visible across all offices and business roles
- Develop a new user-friendly interface that enables reporting, querying, process management, and legacy application management

**REPLACEMENT OF SYSTEM TO MANAGE GRANTS**

This project consists of building and replacing a state government agency's grants management system with a CRM solution built to agency specifications. The new system will include a capitol grants administration module. Our firm was hired to oversee the project and manage a third-party contractor to build the system. Our Project Manager is responsible for ensuring that all milestones are met within the allotted project timeline. The Project Manager is also responsible for all quality assurance aspects of the project, as well as managing requested changes to the original scope and mitigating project risk.

**PROJECT MANAGEMENT OF SYSTEM TO MANAGE WORKERS' PAY**

Our firm has provided project management for a variety of projects surrounding rewriting processes, forms, and reports for a system that manages and accounts for workers' compensation. Our Project Managers began by interviewing users for business process analysis in preparation for development of a project plan to upgrade the existing system. They supported project plan development, provided internal document review and guidance, and handled regular budget status reporting and invoice approval for the client. As the project progressed, participating project managers facilitated and coordinated contract staff in an agile methodology to analyze, build, and deploy a custom solution for a document and case management system to support the department's workflow and other business needs.

**SYSTEM REDESIGN AND CONSOLIDATION**

A state agency had implemented a dozen small, independent systems to track data and provide business information including infrastructure, grants, plans, community profiles and management tools. The systems were out of date, did not comply with state standards, and were riddled with redundant data. Our team documented and analyzed these systems. We then redesigned a system to consolidate three main existing systems and nine subsidiary systems, enhancing manageability and facilitating extensibility as systems and business needs grow. We created a normalized and consolidated entity relational diagram (ERD) and data migration plan, designed a new portal, and integrated the system data to reduce redundancy and increase productivity and extensibility. At the end of the project, we conducted an onsite database modeling class for the benefit of the client's development team.

**ANNUAL DISTRIBUTION ONLINE APPLICATION SYSTEM**

A government agency that oversees a program to distribute nearly a billion dollars to qualified applicants each year contracted with our firm to update its systems and develop a process that allows applicants to submit their annual applications online. As part of this work, we developed the online application process; rebuilt the back-end data systems, updated system tables, screens, and business logic; implemented a program for charitable contributions; and improved the connection with the state's website for authentication. This system has successfully distributed over \$600 million dollars a year for several years. The output from the system yields the single largest Automated Clearing House (ACH) transaction in the nation.

**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.

**PROJECT APPROACH**

**RISK ASSESSMENT**

**EXPERIENCE/QUALIFICATIONS**

**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	x	Est. # Hours	=	Total Cost
\$ 92.00		530		\$48,760.00

ETS Fee (\$300 + .5% of Total Cost)	\$ 543.80
<b>Total TO Cost</b>	<b>\$49,303.80</b>

**PROPOSED INDIVIDUAL RESOURCES**

Tom Fletcher	Mike Brameld	Craig Millard
Mike Podruchny		

**PROPOSED SUB-CONTRACTORS**

Name	Description of Work	% of Overall Work