

Washington State Department of Revenue

ITPS Work Request

Request for Proposal under ITPS 08215, IT BUSINESS ANALYSIS

Work Request number: **258388**

Project name: **InsideRevenue Redesign**

Performance Period (anticipated): **3 Months**

This solicitation is issued by **Department of Revenue** pursuant to the Information Technology Professional Services (ITPS) program, which is separately coordinated by the Washington State Department of Enterprise Services (DES).

DES separately maintains a group of categorized notification lists or "pools" of IT service providers within the state's solicitation notification system ([WEBS](#)) for the state purchasers to advertise their solicitations when they seek competitive proposals for their IT business needs. This is one of those solicitations.

This solicitation is **directed only to those vendors listed in Category 2.** IT Business Analysis.

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WORK REQUEST SCHEDULE



Activity	Due Date	Due Time (PST)
Issue solicitation document <i>(available for download from WEBS Registration and Information)</i>	June 14, 2017 Wednesday	N/A
Written Questions Due from Vendors	June 23, 2017 Friday	5:00 PM PTS 
Written Answers to Vendor Questions	June 29, 2017 Thursday	5:00 PM PTS
Vendor Complaints Due	July 14, 2017 Friday	5:00 PM PTS
Vendor Proposals Due	July 21, 2017 Friday	5:00 PM PTS 
Evaluate Proposals <i>(Note: Entire evaluation process including vendor presentations)</i>	July 24 – August 16 , 2017	N/A
Vendor Presentations <i>DOR reserves the right to change the schedule</i>	August 9 & 10, 2017 Wednesday and Thursday	NA
Anticipated Award Date <i>Apparent successful vendor (ASV) will be posted on WEBS. WEBS posting will be official notification to all vendors of the ASV. (Note: Actual award date may be sooner or later than anticipated date).</i>	August 18, 2017 Friday	5:00 PM PTS
Requests for Vendor Debriefings (No Later Than) <i>(Note: Official award date is the date of notification on WEBS. Debriefings are optional, but are a prerequisite for a Protest)</i>	3 work days after award date	5:00 pm
Vendor Debriefing Conferences (if requested) <i>(Note: If additional time is required, the requesting Vendor will be notified.)</i>	3 business days after debriefing request	N/A
Protests Due (No Later Than) <i>(Note: Official due date will depend on the scheduling of the Vendor's requested debriefing conference.)</i>	5 business days after Vendor's debriefing conference	5:00 pm



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1. Bidder Eligibility

Proposals to this work request will only be entertained from companies who are currently on the WEBS notification list for the technical service category indicated on page 1.

DES, not the Solicitation Coordinator, separately administers the notification lists. In addition to notification lists, is a prerequisite to submitting a proposal to this or any other ITPS Work Request and is separately accomplished by submitting a program agreement (DES Master Contract 08215) to DES. For further detail, refer to the DES ITPS [Webpage](#).

2. Definitions

“Agency” means a government entity of the state of Washington.

“Consultant” means the individual that is proposed by the vendor to do the work under this work request.

“Contract” means a contractual document incorporated by reference to this solicitation and executed between an eligible purchaser and a company. Each Contract shall be the result of a Work Request (competitive solicitation).

“DES” means the Washington state Department of Enterprise Services, any division, section, office, unit or other entity of DES or any of the officers or other officials lawfully representing DES.

“Notification List” means a list within WEBS, which is categorized by technical service category for state purchasers to use for notification purposes when they seek competitive bids or proposals. A company must first register in WEBS and complete the agreement in order to be added to any notification list.

“Purchaser” means the authorized user of the program who may or actually does make purchases of material, supplies, services, and/or equipment under the resulting Contract. Includes any Washington state agency and any authorized party to the [Master Contracts Usage Agreement \(MCUA\)](#). Includes institutions of higher education, boards, commissions, nonprofit corporations and political subdivisions such as counties, cities, school districts, or public utility districts.

“Solicitation” means the process of notifying prospective bidders of a request for competitive bids or proposals. Also includes reference to the actual documents used for that process, along with all amendments or revisions thereto.

“Technical Service Category” means an information technology skill categorized by common IT business need of state government described and set forth in the ITPS agreement.

“Vendor” means the person or firm considering and/or responding to this Work Request.

“Washington’s Electronic Business Solution or WEBS” means DES’s Web-based solicitation notification system.

“Work Order” - See Contract Definition.

“Work Request (WR)” means a purchaser’s solicitation that requests bids or proposals specific to their requirements. An ITPS work request will specify a technical service category(ies) and purchasers will only entertain bids or proposals from companies who are on the notification lists for the technical service category(ies) specified.

3. **Project Description and Background**

The Department of Revenue (DOR) is Washington State’s **principal tax collection agency**. DOR has employees throughout the state within **12 office locations**. DOR values our employees and wants **to provide current and relevant information for them**.

DOR has a need to **replace the existing InsideRevenue intranet site** with a website that can serve as a communication tool for all employees, provide them with the latest DOR news, and serve as an **information hub** that will point employees to the right place to answer their questions. The purpose of this ITPS Work Request is to **partner with a Vendor** to **complete an analysis and recommendation project, prior to building the replacement site**. The overall analysis and recommendation effort will be broken into three phases: **Phase 1** includes **gathering requirements**; **Phase 2** is **conducting a platform assessment**; and **Phase 3** is **documenting and receiving an overall final recommendation** based on the requirements.

InsideRevenue is outdated and is in **need of a major overhaul** for the following reasons:

- It uses a SharePoint 2007 platform and has not been updated or redesigned since 2004.
- The current technology only allows for limited communications (photos, documents, stories, etc.). It restricts flexibility of communications and requires many customizations to meet the desired design.
- The look and feel of InsideRevenue is out-of-date, inconsistent from page to page, and cluttered.
- Navigation is not intuitive. Employees consider it difficult to find information even with the search feature.
- It contains a significant amount of stale content that has not been reviewed for relevance to today’s environment.
- Searches return overwhelming numbers of documents making it difficult and time-consuming for employees to find what they are looking for. This reduces efficiency and productivity.
- It is frustrating and time-consuming for employees to fulfill public records requests, which increases the risk of incurring penalties and fines due to missed deadlines.
- It has no clear governance structure to maintain and keep the site updated and current.
- It does not meet user-centered design standards.

Some of the people that you might work with include employees from each division that currently serve on a team to review data and have responsibility for their individual division’s information. There will be work with the project team members and agency managers.

4. **Scope of Work and Deliverables**

- a.) DOR has a need to **contract with a Vendor** to work with staff to **define the requirements** and **determine what is the best technical platform to host this new site**. (DOR has a preference to host their site on either **Drupal or SharePoint 2016**.)

The scope of work for this project are to:

- Define **overall analysis and recommendations** for InsideRevenue Dedesign Project and provide to for DOR.
- Define what **technical functionality** is needed to build, support and maintain InsideRevenue to meet the business needs.
- Define the **best platform**, either **SharePoint 2016 or Drupal**, to host the new intranet site.

Deliverables include:

- Requirements gathering **plan** agreed to by DOR.
- Documented **set of requirements** delivered to DOR.
- Initial **written analysis of Drupal and SharePoint's ability** to meet requirements.
- Capability Table mapping requirements across both suggested platforms.
- Written **final report** outlining the findings and recommendations/risks/opportunities.
- **Formal presentation** to key management and stakeholders.

If Vendor believes that there may be benefit to DOR to include other deliverables (not identified in this Work Request) to achieve our desired outcome, please include those deliverables for consideration as part of your response by adding them to schedule B.

The selected Vendor will provide all resources necessary and IT professionals necessary to fulfill critical technical role as outlined in this **Section 4**. DOR staff will be available to work closely with the Vendor. The selected Vendor will work closely with the DOR Contract Manager on all aspects of this work. DOR may reasonably request that the Vendor remove and replace any key Vendor staff for any reason, and Vendor shall remove any such staff and provide appropriate replacements with DOR's approval. Vendor agrees to maintain a consistently high skill level among all replacement of personnel. Any staff the Vendor assigns to this work, the Vendor must also supply their resumes for DOR Work Requirements for Proposed Vendor.

b.) Work requirements for the proposed Vendor include the following:

- Must be able to **work at the Tumwater Office Location**.
- Able to **participate in person** to attend onsite project team meetings.
- In addition, include **other remote locations** that may include DOR regional offices and other public meeting places.
- The Vendor may be required to perform **work during hours** that are compatible with other project core team members and business area customers in order to maximize team effectiveness.

The selected Vendor can be assigned one or more workstations as needed and assessed a workstation fee of \$0.00 per month for each workstation.

5. Knowledge and Experience Required for Consultants

The selected Vendor must be able to provide consultants with technical expertise and experience in the skills listed below:

- Knowledge and expertise with Drupal (capabilities, limitations and security).
- Knowledge and expertise with SharePoint, to include 2016 (capabilities, limitations and security).
- Knowledge and expertise in functional analysis – helping an organization to improve functionality.
- Knowledge and expertise in creating strategic technology recommendations that clearly tie to business and technical requirements.
- Knowledge and expertise in requirements gathering and analysis.
- Experience in delivering technical presentations to both technical and non-technical key stakeholders and other audiences.

Experience and Qualifications of Vendors

DOR prefers that the Vendor possess substantial knowledge of the subject identified in this ITPS Work Request and as evidenced by previous contracts or projects, and their skills and experience. The Vendor's references included should demonstrate strong subject matter knowledge, skills and abilities in relevant similar work.

6. Period of Performance

DOR anticipates three months. DOR reserves the right to extend the period of performance. Any Contract awarded as a result of this procurement is contingent upon the availability of funding. DOR reserves the right to cancel this Work Request at any time if it is in the best interest of DOR.

7. Roles and Responsibilities

Vendor will work with DOR to accomplish the scope of the work and all the deliverables as outlined in Section 4. Given DOR's expectation of working collaboratively with the Vendor, a high degree of onsite presence is expected for this engagement. DOR expects the Vendor and/or Vendor's Consultants to be onsite for project meetings, assignments requiring collaboration and to use DOR facilities for work sessions or other meetings with DOR staff.

DOR's Contract Manager for this ITPS Work Request will provide oversight of the activities conducted during the project and will be the principal point of contact for the Vendor. The Contract Manager will also approve all deliverables prior to payment and will act as the project manager for the work.

8. Delivery of Electronic Proposals

The proposal must be received by the Work Request Coordinator no later than the date and time as outlined in the Work Request Schedule. Proposals must be submitted electronically as an attachment to an Email to:

Tammi Clawson
Email: DORbidresponses@dor.wa.gov
Phone: (360) 596-3747



Backup

Heidi Whisman
Email: DORbidresponses@dor.wa.gov
Phone: (360) 596-3782



Note: You will receive confirmation by the next business day that your response was received. If you do not receive the confirmation, please contact the Work Request Coordinator by phone.

Attachments to e-mail shall be in Microsoft Word format or PDF. Zipped files cannot be received by the AGENCY and cannot be used for submission of proposals. The AGENCY does not assume responsibility for problems with Vendor's email. If the AGENCY'S email is not working, appropriate allowances will be made. Proposals may not be transmitted using facsimile transmission.

All proposals and any accompanying documentation become the property of Purchaser and will not be returned.

9. Work Request Proposal Content Requirements:

Bidders must include the following to be considered responsive.

- A written proposal to include: Approach, Methodology with total project cost.
- Vendor Information Response Form - Schedule A.
- Deliverables Matrix – Schedule B.
- Consultant(s) Resume for each consultant submitted for the project.

Failure to provide this submittal detailed herein will render a proposal non-responsive.

The proposal must include the signature of an authorized bidder representative on all documents requiring a signature.

Proposal must include the following:

- **Approach and Methodology:** Provide a detailed description of your firm's overall planned approach and methodology for meeting the expectations, deliverables and project goals outlined in this Work Request.
- **Cost:** Cost for each deliverable should be provided. DOR's intent is to identify Vendors with the necessary knowledge and experience at the lowest cost possible. (*Cost is not scored – only considered*) You must submit Deliverables Matrix - **Schedule B.**
- **Timeline:** A Timeline outlining how long it will take to accomplish each deliverable should be provided. You must provide this information on Deliverables Matrix – **Schedule B.**
- **Resumes** of all proposed consultant(s). Resumes should clearly show the knowledge, skills and experience in the areas outlined in the Work Request.

DOR reserves the right to waive, at its sole discretion, minor administrative irregularities contained in any Vendor response.

DOR is not liable for any errors in Vendor responses. Vendors will not be allowed to alter response documents after the deadline for response submission. Vendors are liable for all errors

or omissions contained in their responses. DOR reserves the right to contact the Vendor for clarification of response documentation.

In the event of discrepancy between information contained in this Work Request and amendments hereto, and in other information entered in WEBS, the Work Request or amendment language shall take precedence.

10. **Experience and Qualifications of Consultants**

The Vendor's proposed consultant(s) must be **senior (8 years)** or **expert level (5-7 years)** having recent years' experience demonstrating knowledge, skills and abilities in the areas as defining recommendations and **website design** and **development** using different platforms such as **SharePoint and Drupal**.

11. **Supporting a Diverse Supplier Pool, including Veteran, Small, Minority and Women-Owned Firms**

In accordance with chapters 39.19, 39.26 and 43.60A **RCW**, the state of Washington encourages participation in all of its procurements by firms **certified by** the **Department of Veterans Affairs** (WDVA), firms **certified by** the **Office of Minority and Women's Business Enterprises** (OMWBE), and **small, mini and micro-businesses**. Participation may be either on a **direct** basis in response to this solicitation or on a **subcontractor** basis. However, no preference will be included in the evaluation of proposals, no minimum level of participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis.

Proof of Certification (if applicable; not scored): Include proof of certification issued by OMWBE and/or WDVA along with your response to this Work Request.

For information on certified firms, or becoming a certified vendor contact OMWBE at 360/753-9693 or visit <http://www.omwbe.wa.gov> or contact WDVA at 800/562-0132 or visit <http://www.dva.wa.gov>.

12. **Evaluation**

DOR's intent is to identify Vendors with the necessary knowledge and experience at the **lowest cost**.

Award Criteria

Award will be based on the following criteria and will be in accordance with provisions identified in [RCW 39.26.160](#) and other criteria identified in this Work Request.

Purchaser reserves the right to determine at its sole discretion whether a bidder's response to "Responsive Administrative Requirement" is sufficient to pass.

Listed below the evaluation process. Once the evaluation process has been completed, DOR will award Apparent Successful Bidder (ASV). DOR reserves the right to select the Vendor that best aligns with DOR's business need.

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PHASE 1. REQUIRED RESPONSIVENESS OF ADMINISTRATIVE REQUIREMENTS FULLY COMPLETED:	
Submission by the date and time as indicated in the ITPS Work Request Schedule	
Written Proposal Approach and Methodology	
Cost and Timeline for each deliverable - Deliverables Matrix – Schedule B.	
Vendor Information Response Form – Schedule A.	
Resumes for each proposed consultant.	
ALL RESPONSIVE VENDORS WILL PROCEED TO THE WRITTEN EVALUATION PROPOSAL PHASE 2.	
Phase 2. WRITTEN PROPOSAL EVALUATION	Possible Points 60
Proposal Approach and Methodology	10 points
Cost and timeline for each deliverable - Deliverables Matrix - Schedule B. (Note: cost element is not scored.)	10 points
Qualifications and Experience of Vendor's Firm – Schedule A.	10 points
Resumes Qualifications and Experience of Vendor Proposed Consultants	30 points
TOP SCORING VENDORS WILL BE INVITED FOR PRESENTATIONS	
Phase 3. VENDOR PRESENTATIONS –	Possible Points 30
Vendor presentations will be an hour and an additional thirty minutes for Q&A Presentations will include: <ul style="list-style-type: none"> • Share approach and methodology • Share your “proposed critical success factors” for this scope of work. • Discuss qualifications of consultant(s) proposed. • Any additional information (not scored) 	10 points 10 points 10 points
TOP SCORING VENDER PRESENTATIONS WILL PROCEED TO REFERENCE CHECKS.	
Phase 4. Vendor Reference Checks	Pass/Fail

Note: If DOR is unable to make contact and obtain a reference within 3 days – the reference check will be a fail.

Phase 1. Responsiveness

All proposals will be reviewed by the Work Request Coordinator to determine **compliance** with administrative requirements and instructions specified in this Work Request. Vendors are specifically notified that failure to comply with any part of the Work Request may result in rejection of the proposal as non-responsive. All responsive proposals will move to Phase 2 of the evaluation.

Phase 2. Written Proposal Evaluation

During this phase, all written materials of responsive proposals will be evaluated including, Approach, Methodology and Timeline for each deliverable, resumes, and experience of Vendor. Cost will be considered and not scored. All submitted proposals will be scored for best **alignment with DOR's business need** as defined under the Scope of Work. Top scoring proposals will move to Phase 3.

Phase 3. Vendor Presentations

Vendor presentations will be limited to a **1.5 hour in duration, with the first hour for the actual presentation and then 30 minutes for questions** and answers from the DOR team. During the presentations, please be prepared to introduce your company and introduce your staff, share your approach and methodology. Please include your *"critical success factors"* for this work, and any additional information that would be beneficial for DOR to know. At the end of the presentation DOR, team may ask follow-up questions. Please note: Written proposal evaluation scores will not be combined with Vendor Presentation scores. Top scoring Vendor Presentations will move to Phase 4 Vendor Reference Checks.

Phase 4. Vendor Reference Checks

After completion of Phase 3, reference checks will be completed. DOR reserves the right to award the Work Request to the Vendor deemed to best meet the needs described in this Work Request. The Apparent Successful Bidder will be posted on WEBS.

13. COMPLAINT PROCESS

The purpose of the complaint process is to settle unresolved vendor issues or concerns that either were not or could not be resolved during the question and answer period. The complaint process for this solicitation follows.

- a) The deadline for filing complaints regarding this solicitation is stated in the Work Request Schedule.
- b) Only complaints based on one or more of the following reasons will be addressed:
 - i. This solicitation unnecessarily restricts competition.
 - ii. This solicitation evaluation or scoring process is unfair or flawed.
 - iii. The requirements of this solicitation are inadequate or insufficient to prepare a response.
- c) Vendor complaints must meet the following requirements:
 - i. Be in writing.
 - ii. Be submitted via email to the procurement coordinator listed for this solicitation.
 - iii. Be received by DOR no later than the deadline stated in the Work Request Schedule.

- iv. Clearly articulate the basis for the complaint.
 - v. Include a proposed remedy.
- d) The Work Request Coordinator or designee will respond to complaints in writing.
- i. The Work Request Coordinator will work with the appropriate DOR staff to develop the response.
 - ii. Complaint responses, including any resulting changes to this solicitation, will be posted on WEBS.
 - iii. The Director of DOR will be notified of all complaints along with a copy of the response to each.
- e) Complaints may not be raised again during the protest period.

14. PROTEST PROCESS

The purpose of the protest process is to allow vendors to raise issues related to the evaluation process as set out in the solicitation or how the process was executed. The protest process for this solicitation is as follows:

a) Vendor Debriefing Conference – prerequisite for submitting a protest

- i. Only vendors who submit a response to this Work Request may request a debriefing conference.
- ii. A request for a debriefing conference may be submitted only after announcement of the apparent successful vendor.
- iii. The Work Request Coordinator must receive the request for a debriefing conference via email by the date and time specified in the Work Request Schedule.
- iv. Debriefings will be scheduled within three business days of the request. If additional time is required, the requesting vendor will be notified of the delay.
- v. The optional debriefing will be limited to critique of the requesting vendor's response. Comparisons between work requests or evaluations of other work requests will not be allowed. Debriefings will be conducted via phone and limited to one hour in length.

b) Deadline for filing a Protest – Five (5) business days after debriefing

- i. In order to submit a protest on this Work Request, a vendor must have submitted a response to this Work Request and have had a debriefing conference with DOR.
- ii. The written protest must be received by the DOR Work Request Coordinator within five (5) business days after the debriefing conference.

c) Grounds for Protest - Only protests based on one or more of the following reasons will be considered:

- i. Bias, discrimination, or conflict of interest on the part of an evaluator.
- ii. Errors made in computing the scores.
- iii. DOR non-compliance with procedures described in the Work Request document or agency protest procedures or DES requirements.

d) Vendor protests must meet the following requirements:

- i. Be in **writing**.
- ii. Be submitted **via email** to the Work Request Coordinator listed for this work request.
- iii. Include the Requisition Number of this solicitation
Include information about the protesting vendor; name of firm, mailing address, phone number and name of individual responsible for submission of the protest
- iv. Include specific reference to the grounds for protest and all facts and arguments upon which the vendor relies.
- v. Specific and complete statement of the agency action(s) being protested;
- vi. Description of the relief or corrective action requested;

e) DOR Review Process

- i. Upon receipt of a vendor's protest, DOR will postpone signing a Contract with the successful vendor until the vendor protest has been resolved.
- ii. DOR will perform an objective review of the protest by individuals not involved in the acquisition process being protested. The review shall be based on the written protest material submitted by the vendor and all other relevant facts known to DOR.
- iii. DOR will provide a written decision to the protesting vendor within ten (10) business days after receipt of the vendor protest, unless more time is needed. The protesting vendor will be notified if additional time is necessary.
- iv. The DOR protest decision is final and no appeal process is allowed. If the protesting vendor does not accept the DOR protest response, the vendor may try to seek relief from superior court.
- v. At the time DOR issues the written decision to the protest, it will also provide a copy of the original protest and the response to the Directors of DOR and the Department of Enterprise Services.

15. Work Request Schedules and Exhibits:

Vendor Information Response Form – **Schedule A.**

Deliverables Matrix – **Schedule B.**

Sample Contract - **Exhibit A.**