

# eProcurement Application Development

## Statement of Work

### DIR-SDD-2081-SOW1-TSO

The following documents are hereby incorporated to form the Statement of Work in its entirety:

DIR Statement of Work  
Sense Corp Response  
Sense Corp BAFO

X signature on file

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Hershel Becker  
Chief Procurement Officer - Tx. DIR

X signature on file

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Jimmy Schatte  
Managing Director - Public Sector Sense Cor...

**STATEMENT OF WORK (SOW)**  
**FOR**  
**DELIVERABLES-BASED INFORMATION**  
**TECHNOLOGY SERVICES**

***eProcurement Project***  
***Application Development***

***Texas Department of Information***  
***Resources***

***July 20, 2016***

## **Department of Information Resources Deliverables-Based IT Services (DBITS) Contract**

### **1.0 Introduction**

- 1.1 The purpose of this project is to provide enhanced functionality and technology to support the Texas Department of Information Resources (DIR) procurement and contracting business processes. Procurement is a strategic function that consists of the competitive actions required for the creation and administration of contracts.
- 1.2 DIR has looked at a number of COTS and SaaS web based applications to attempt to obtain an eProcurement Application that would support DIR's unique requirements. Not finding one that meets all of the required functionality requirements, DIR has decided to leverage existing applications.
- 1.3 The Application will need to interface with these existing applications as well as the Oracle based Comptroller's Centralized Accounting and Payroll/Personnel System (CAPPS) to ensure a robust, information-rich Application. Preferably, the Application will also have an open architecture to aid in interface development. Further, experience in providing these interfaces in the past will be taken into consideration.
- 1.4 Vendor may be notified to provide Proof of Concept demonstrations at no cost to DIR. Vendor shall be allowed no more than four (4) business hours to present their software solution and 30 minutes before and after for setup and break down of presentation.

### **2.0 Background**

- 2.1 Currently, the State of Texas manages its Vendor registration through the Statewide Procurement Division of Texas Comptroller or Public Accounts (SPD) Central Master Bidders List (CMBL). SPD also handles various statewide (multiple-agency, multiple-government) contracts, and a limited number of agency specific contracts on the TXSmartBuy system- the State's Online Ordering system [www.window.state.tx.us/txsmartbuy/](http://www.window.state.tx.us/txsmartbuy/).
- 2.2 Salesforce.com hosts much of the previously manually managed data related to solicitations. SharePoint is available to manage the document storage, version control, and some metadata on existing contracts. Those two platforms, as well as, DocuSign provide varying levels of work flow support to our needs. These systems do not interface with CAPPS. We have Subject Matter Experts (SMEs) for each of these but require a vendor than can supply the contractors with additional expertise to move this project forward quickly. Our SMEs will provide oversight for the activities of the Awarded Vendor.
- 2.3 Similar approaches apply to the individual contract creation and contract administration activities. The DIR uses a manual, non-integrated system with a word processing and spreadsheet software backbone.

### **3.0 Scope**

The Awarded Vendor shall provide, in accordance with the terms of the Statement of Work and Attachments to include and not be limited to, all services reasonably associated with the provision of an eProcurement solution, assessment and analysis of DIR current environment, recommendation of methodology for implementation, implementation plan, implementation services, training, maintenance and support, and further development or customization as desirable and applicable. The final determination of the solution shall be at the discretion of DIR. Goals and objectives for this procurement must include the following:

- 3.1 Customization: To facilitate the DIR requirements, customization and modifications to

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the existing applications are anticipated. Such customizations shall not however negatively impact, limit or significantly diminish the existing applications functional integrity. Customizations shall not prevent upgrades into subsequent release levels of the base software or new version(s).

3.2 Post Implementation Support: Awarded Vendor shall continue to provide support beyond System implementation, through a predetermined period of time or predetermined events, as set forth in the Implementation Plan. Implementation shall not be considered as being complete until all post implementation services are concluded.

3.3 Awarded Vendor Roles and Responsibilities:

3.3.1 Awarded Vendor Resources – The Awarded Vendor shall provide a Contract Project Manager responsible and accountable for:

3.3.1.1 Ensuring project activities are completed according to the Awarded Vendor's Implementation Plan

3.3.1.2 Monitoring performance of the Awarded Vendor's resources, staff, etc.

3.3.1.3 Working with and reporting directly to the DIR Project Manager and DIR Chief Procurement Officer or designee regarding technical project activities

3.3.1.4 Working directly with the Contract Administrator and DIR Project Manager regarding contract monitoring requirements

3.3.1.5 Working with the IT Technical Support staff regarding the integration, installation, implementation, connectivity and etc.

3.3.1.6 Reporting to the DIR Project Manager regarding compliance with specifications, requirements, milestone and other related activities

3.3.1.7 Developing executive level status reports as requested

3.3.1.8 Performing liaison activities between Awarded Vendor's staff and DIR staff

3.3.1.9 Coordinating through DIR Project Manager, who will assign personnel from systems development, systems support, and application programming, as appropriate, to work with the Awarded Vendor and their assigned staff

3.3.1.10 Providing and maintaining the list of assignments as well as identifying the type of technical and functional DIR staff support necessary to accomplish the eProcurement Application.

3.3.1.11 Have all personnel assigned to the services, related to this project, sign DIR security agreements and submit to criminal background checks paid for and reviewed by DIR.

3.3.1.12 Participate in a Project Kick-off Meeting hosted by DIR Project Manager, Awarded Vendor shall attend at no additional cost to the State.

3.3.1.13 Conduct a GAP/FIT Analysis to gather necessary information to assess DIR current environment in preparation for the new Application within five (5) business days of the initial Project Kick-off Meeting.

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- 3.3.1.14 Provide integration and application methodology and recommendation for DIR review, consideration and approval. If Awarded Vendor solution contains products that are required as part of the overall solution, DIR will consider these products and if approved will provide them as Owner Furnished. The cost for these products should not be built into the Vendors project cost as DIR. Awarded Vendor will only provide services. Preference to SaaS, PaaS, or COTS that are on DIR contract will be given if Vendor recommends a solution outside of their development activities.
- 3.3.1.15 Create and confirm a detailed Implementation Plan, Project Plan and Schedule within ten (10) business days of the GAP/FIT Analysis. The Implementation Plan at a minimum shall identify the specific steps to be taken during the development and implementation of the Application solution and incorporation of the data. The Project Plan at a minimum shall consist of how and when the project objectives are to be achieved, by showing the major products, milestones, activities, and resources required on the project and shall describe the duration and completion of each task. The Implementation and Project Plan(s) and Schedule(s) must be acceptable to DIR Project Manager and mutually agreed upon by written signature of DIR and Contract Project Managers, before work begins.
- 3.3.1.16 Create a System Design Document (SDD) for each requirement identified by DIR to meet the State of Texas Procurement Laws, Rules, and Procedures that shall be incorporated. Awarded Vendor shall coordinate technical review sessions with DIR upon the completion of each requirement portion of the SDD. The SDD should describe in industry standard(s) detailing the technical steps taken to complete any transfer of the data.
- 3.3.1.17 Provide test plan, test scripts with predicted results, training plan, and training materials particular to each Deliverable in this SOW. Training and Knowledge Transfer of the system operations and capabilities will be held for key DIR personnel.
- 3.3.1.18 Develop a communication plan in coordination with DIR to include but not be limited to the status of the development, implementation and testing to ensure the synchronized and updated information such as schedule, concerns, risks, issues, and upcoming project activities are approved by DIR.
- 3.3.1.19 Provide on-site technical assistance during all phases of the implementation through the final testing and acceptance, training and post implementation of the Application go live date.
- 3.3.1.20 Provide a demonstration of proposed user interfaces prior to the submission of the Deliverable or as requested by DIR.

3.4 DIR Roles and Responsibilities:

- 3.4.1 The following identifies the general roles designated to support or provide information to the Awarded Vendor. DIR will provide:
  - 3.4.1.1 Contract Management Support: Contract Administrator/ Manager
  - 3.4.1.2 Project Management Support: Project Sponsors and Project Manager
  - 3.4.1.3 Development and Technical Support: Technical Coordinator and staff from DIR will be involved in providing direction and guidelines related to infrastructure, data sources and security requirements.

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- 3.4.2 Provide information for each State of Texas requirement the Awarded Vendor is required to incorporate.
- 3.4.3 Ensure necessary DIR participants attend meetings, teleconference and working sessions.
- 3.4.4 Review all documentation and provide feedback, including corrections, required modifications or approval within five (5) business days.
- 3.4.5 Respond to Awarded Vendor's queries for additional information.
- 3.4.6 Provide test data and samples upon Awarded Vendor's request.
- 3.4.7 Provide work space for the Awarded Vendor's technical team at DIR discretion.
- 3.4.8 Provide Workstations with connectivity to network resources at DIR discretion.
- 3.4.9 Provide Development, Test, and Production environments for this project. Access to these environments can only be performed using DIR issued workstations and connectivity provided by DIR.

**4.0 Deliverables**

- 4.0.1 All Deliverables must be submitted in a format approved by the DIR Contract Manager.
- 4.0.2 If the Deliverable cannot be provided within the scheduled time frame, the Vendor is required to contact the DIR Contract Manager in writing with a reason for the delay and the proposed revised schedule. The request for a revised schedule must include the impact on related tasks and the overall project. If Service Levels have previously been agreed to for a Deliverable, it will be DIR's decision as to whether the vendor will be provided relief on any potential penalties depending on the reason and impact of the change in schedule.
- 4.0.3 A request for a revised schedule must be reviewed and approved by the DIR Contract Manager before placed in effect. Contract Terms and Conditions may dictate remedies, costs, and other actions based on the facts related to the request for a revised schedule.
- 4.0.4 A kickoff meeting will be held at a location and time selected by the DIR Project Manager where the Vendor and its staff will be introduced to the DIR Contract Manager and the assigned DIR personnel.
- 4.0.5 Many of the Deliverables in this SOW could be developed independently but final Application should allow for multiple integration points as needed. DIR would prefer this development to be done using an Agile methodology.

**4.1 Deliverables for this SOW**

Refer to Attachment A for detailed requirements for each Deliverable.

**Deliverable 1: Project Preparatory Work:**

This includes all activities and documentation listed in sections 3.5 through 3.11. Awarded Vendor must provide a report outlining how and when all listed activities in those sections will be accomplished.

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**Deliverable 2: Suggestion Site:**

Application/Website must be developed to allow internal DIR personnel and individuals representing external governmental entities to request that specific products or type of service be considered for future DIR contracts. Application/website will interface with existing Salesforce.com data sets.

**Deliverable 3: Solicitation Library:**

A backend Application/website must be developed or procured that would allow for online solicitation generation and publication. The application must also provide reports as specified in Attachment A and as agreed to by DIR and Awarded Vendor. Solicitation generation shall:

- Provide the ability to create and amend a solicitation using content libraries or freeform. This may include separate libraries of terms and conditions based on version of terms or by the type of solicitations (ie. Services, Training, Products, etc.)
- Provide the ability for DIR personnel to create and update content in the above created library.
- Clone and amend existing documents to eliminate need to rekey data previously used.
- Integrate with existing Salesforce.com Contract related applications.
- Download NIGP codes from a third party site to keep the internal NIGP code list up to date.
- Maintain version control and history.
- Since the final procurement package might include multiple documents and files, the application will also need to allow for additional documentation and artifacts to be uploaded to the common bid package and apply the solicitation number to the metadata of each document or artifact.
- Provide a checklist for the contract manager to use to verify the completeness of the package. The package should not be allowed to be routed for approval without a completed checklist. Multiple checklists can be stored in the Solicitation library so that owner of that solicitation may choose the one appropriate for that effort.
- Track a completed solicitation package through the internal approval process at DIR. It will document the workflow of sending final procurement package (solicitation plus supporting attachments) to internal managers and executives for review and signoff. This process would also be used to track the workflow for any addendums to the solicitation.
- Allow the routing of the draft through a workflow for approval prior to posting. Routing may be accomplished by interfacing with existing DIR applications already used. Those current toolsets are Salesforce.com, SharePoint, and DocuSign.
- Once the created package is approved, the solicitation must be posted to Electronic State Business Daily (ESBD), a system which is maintained by the Comptroller of Public Accounts. An application/interface must be developed to automate moving all appropriate documents, artifacts, and metadata to the ESBD. This interface will also allow for addendums to the solicitation to be posted to the appropriate existing solicitation already on ESBD should it be necessary.
- Allow for electronic release to vendors based on commodity code. This would require the ability to draw information from the Vendor Information System (Deliverable 5) to facilitate that distribution.
- Allow for electronic release to designated print media for legal notice publication through Interfaces with other State Systems such as CAPPs, TX SmartBuy, and ESBD.
- Allow for a developed and approved Solicitation to be added to the Vendor Submittal of Offers portion of Deliverable 6.
- Assign unique sequential solicitation numbers in a format prescribed by DIR (DIR-SDD-TMP-###, DIR-TEX-AN-NG-XXX)
- Allow specific key dates and other data be assigned to each solicitation to be captured. Data includes (but is not limited to):
  - NIGP (commodity) codes
  - deadlines for questions
  - deadlines for answers

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- deadlines for submission
- whether a vendor conference is necessary
- the location of any such vendor conference
- the methods of attendance (conference call, in-person, or webinar)
- list of attendees
- the posted agenda of such meetings, any recordings/logs of the meeting, and how vendor attendance was determined/tracked.
- Allow searching on any of the data elements immediately above. See Attachment A for additional Solicitation Requirements.
- Application shall also provide reports as specified in Attachment A and as agreed to by DIR and Awarded Vendor.

**Deliverable 4: Contract Administration and Usage Tracking:**

Application shall at a minimum allow authorized DIR personnel and management to amend, extend, suspend, and terminate contracts. Application shall allow for tracking contracts by key dates, such as contract expiration or other keyword search. Application shall have the ability to maintain contract administration documents per contract. Application shall have the ability to collect usage information, both as submitted by the Vendors or from the use of contracts previously entered into the Application. DIR will provide a sample of data currently stored in our existing systems. Application shall also provide reports as specified in Attachment A and as agreed to by DIR and Awarded Vendor.

**Deliverable 5: Vendor Information System:**

This Application/website shall allow for online vendor registration, including editing and updating. The functionality shall include management of vendor profiles and commodity codes. Commodity code selection and vendor profiles shall be accessible by vendors via secure online connection. Establishment of an interface with the CMBL will be a component of this Deliverable to facilitate the import of new registered vendors from that system. The DIR system will not provide updates back to CMBL. The Application must also provide reports as specified in Attachment A and as agreed to by DIR and Awarded Vendor. See Attachment A for details for types of data to be stored.

**Deliverable 6: Solicitation Responses:**

**Vendor Submittal of Questions:** An Application/website must be developed to allow individuals representing interested vendors to post questions to obtain clarifications of posted solicitations. The Application should have the capability to allow DIR personnel to edit or redact questions content prior to creating answers. The questions recorded and any answers supplied by DIR should be visible to all interested vendors. A report of the Questions and Answers recorded and displayed on this website, on the expiration of the timeframe to gather and provide such answers. This report should automatically be created and uploaded to ESBD for display as an addendum to the solicitation already on ESBD.

**Vendor Submittal of Offers:** Application/website shall allow for:

- Online offer creation, edits and submission by vendor.
- Receive offers and other documents, date and time stamp their receipt, flag documents as public or private, and place submission in a controlled environment.
- Vendor should also be able to provide corrected documents, addendums, and additional collateral material to a previously provided response by use of their Vendor ID and RFO number.
- DIR personnel will not have access to this environment until the published deadline is past.
- Any submissions not completed by the submission deadline will not be recorded and a refusal message will be provided to Vendor.
- Application shall also provide reports as specified in Attachment A and as agreed to by DIR and Awarded Vendor.

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**Deliverable 7: Evaluation and Tabulation:**

The rules engine is a data set that DIR personnel will populate with the acceptable values or range of values that are unique to each solicitation. DIR will provide a set of forms that will be used by the vendor to capture data elements that will be scored by the automation within this tool.

Awarded Vendor will develop an Application that provides for:

- Confidential online evaluation of offers received in response to a solicitation.
- Configurable evaluation sub-process and/or solicitation tabulation.
- The creation of evaluation questions and/or criteria utilizing library of questions with the ability to assign varying weights or multipliers to the question unique to each solicitation.
- Evaluation of technical scoring.
- Evaluation of price scoring based on multiple pricing methodologies such as volume pricing, percentage off of MSRP, average discount or fixed price.
- The ability to provide scoring comments by evaluators and contract managers.
- The ability to provide DIR management with reporting on tracking the progress of evaluators.
- The reading of the form, the comparison of the values within each related data element to the rules engine that will display, retain, and report the scoring of each value.
- A controlled workflow and roles based access of the result sets for distribution to the DIR personnel (3 to 40 personnel) assigned to manually score non-automated components of the solicitation.
- The ability for vendor responses to be manually scored for completeness, reference checks, financial status, and other criteria not part of the automation scoring. These values will need to be added to the scoring results already applied by automation to provide a master score.
- The ability for DIR to identify "competitive breaks" against combined evaluation scores.
- The ability for vendor response to contain information related to the Historically Underutilized Business Plan.
- Ability for evaluators to attach supporting documents and/or files to procurement-related records. At solicitation, evaluation, negotiation, contract development, etc.
- Automation that will route internally the recommendation to negotiate, record approval, and notification function that alerts vendors of their status.
- Reporting, as specified in Attachment A, and as agreed to by DIR and Awarded Vendor.

**Deliverable 8: Contract Award, Auditing and Reporting**

**Contract Award:**

Awarded Vendor shall create an Application/website that:

- Allows for the awarding of contracts based on offers received in response to solicitations conducted and recorded within the Application/website.
- Includes a notification function that alerts Awarded Vendors of the completion of the solicitation process and of any resulting contract awards including award notice to the ESBD.
- Provides reports as specified in Attachment A and as agreed to by DIR and Awarded Vendor.

**Solicitation Transparency and Audit Trail:**

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Awarded Vendor shall create an Application/website that:

- Allows for the public, non-secured access, viewing of at a minimum the following: completed solicitations; the awarded vendors' offer; evaluation summaries on offers submitted in response to completed solicitation; as well as all contracts awarded in response to completed solicitations.
- Provides the ability for DIR to review this information, redact required information, and publish the remaining data.
- Ability to integrate with Vendor Sales Report from Data Warehouse (Oracle based) to record, report and maintain spending analysis of Customer purchases, commodities, vendors use and volume.

**Generate Reports**

- The Application should integrate with existing applications and have the ability to validate and create custom reports based on metadata within the Application
- Vendor may assist in creating up to 20 unique reports

**Deliverable 9: Project Closeout and Post-Implementation Support**

This 90-day period facilitates the Awarded Vendor's continued support beyond Application implementation, through the predetermined period of time as set forth in the Implementation Plan. Implementation shall not be considered as being complete until all post implementation services are concluded. Vendor duties to be performed as a part of project closeout include, but are not limited to:

- Complete Knowledge Transfer to DIR's Information Technology Services (ITS) support personnel.
- Complete user training to key DIR Technology Sourcing Office (TSO) resources.
- Complete review of final draft of all technical documents, users guide and training materials.
- Satisfactory resolution of issues encountered during the Post Deployment Validation period.
- Application successfully ran free of defects for at least 30 days.
- Submit final source code for all Deliverables to ITS's source code control system.
- Documentation of lessons learned.

**4.2 System Functions and Requirements:**

- 4.2.1 Passwords: Application shall support integration with DIR's Vendor Portal. DIR will provide password standards to be enforced.
- 4.2.2 Roles based Security: All Deliverables within this Application will have data provided from multiple vendors, interested parties, and DIR personnel. Application shall have the ability to securely limit authorized users to the menus, screens and functions (e.g. inquiry or update) that are appropriate to their organization and role. Roles based security controllable by DIR will be a requirement for all Deliverables in this SOW,
- 4.2.3 User Audits: Application shall have the ability at a minimum to create log files to provide any user(s) or processor's change to any field, object, or Developed Applications' function.
- 4.2.4 Identification Management: Application should support integration with DIR's Vendor Portal.

**5.0 Testing and Acceptance.** Testing and Acceptance shall include, but not be limited to:

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- 5.1 System Testing: DIR shall provide procurement samples, use cases, and test cases to Awarded Vendor. The Awarded Vendor is solely responsible for testing and integration testing against those provided materials. Awarded Vendor shall provide assistance during the System Performance testing and User Acceptance Testing. At a minimum, the Awarded Vendor and DIR shall utilize the Developed Applications to exercise all functions and verify commands and confirmations of all processes that relate to procurement. Based on the outcome of successful System and Performance Testing, DIR shall advance to the next step of User Acceptance Testing. All successful Testing shall be defined as 100% pass rate for all defined system test cases.
- 5.1.1 Vendor shall log all defects found during the System Testing in the agreed upon defect tracking application.
- 5.1.2 Awarded Vendor shall provide a documented response to the documented defect in the agreed upon defect tracking application. DIR intends to provide the tracking system for this project.
- 5.1.3 Awarded Vendor shall correct all defects, error and issues at no additional cost to DIR.
- 5.1.4 Applications developed or procured must comply with all of the following Accessibility Standards:
1. [Section 508 of the Rehabilitation Act \(29 U.S.C. 794d\), as amended](#)
  2. [Web Content Accessibility Guidelines \(WCAG\) 2.0](#), conformance level AA
  3. [1 Texas Administrative Code, Chapter 206](#)
  4. [1 Texas Administrative Code, Chapter 213](#)
- 5.2 User Acceptance Testing: Following successful completion of the System Testing, DIR shall coordinate and execute User Acceptance testing in the testing environment. User Acceptance Testing shall be performed by DIR employees on “Real” documents requiring procurement processing by DIR. Vendor Project or Contract Manager should be on-site during this period to facilitate communications and speedy resolution to issues.
- 5.2.1 DIR will notify Awarded Vendor of any defects suspected in the User Acceptance Testing.
- 5.2.2 Awarded Vendor shall investigate any suspected defects and correct if necessary.
- 5.2.3 Awarded Vendor shall respond with the details of the finding within two (2) business days of notice of any suspected defects by documenting the response in the agreed upon defect tracking system.
- 5.2.4 Awarded Vendor shall describe the nature of any defects reported and any corrective action taken in the response.
- 5.2.5 The Developed Applications, modifications, customized field, tables and etc. must operate defect free as a complete system for a minimum of thirty (30) continuous day review period. If the number of defect failures prevents all systems from operating as described above, the DIR may reject the entire final Developed Applications.

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- 5.3 Final Acceptance of the Developed Applications and the completed solution, begins with the declared kickoff of Deliverable 9. Final Sign-off shall not occur until ninety (90) days after that kickoff of Deliverable 9 and must include thirty (30) days failure free operation of the system and delivery of all required documentation.
- 5.4 Failure Resolution: Upon failure of any test within the control of the Awarded Vendor, Awarded Vendor shall submit a report describing the nature of the failure and the actions to be taken to remedy the situation prior to any modification or replacement of the Application, within five (5) business days. DIR shall provide written approval within five (5) business days. If a system requires modification, the fault shall be corrected and the test repeated until successfully completed.
  - 5.4.1 Major discrepancies that will substantially delay receipt and acceptance of the system shall be sufficient cause for rejection of the system. Failure to satisfy the requirements of any test is considered a defect and the system shall be subject to rejection by DIR. Any rejected Developed Application package may be offered again for retest provided all noncompliance has been corrected.
  - 5.4.2 Resolution of System Test Failure. If the Developed Application package fails the System Integration Test, Awarded Vendor shall correct the fault and then DIR will repeat the Systems Test until successfully completed.
  - 5.4.3 Resolution of Final Acceptance Test Failure. If a defect within the system is detected during the Final Acceptance Test, DIR shall document the failure. Awarded Vendor will be required to research, document and correct the source of failure. Once corrective measures are taken, DIR shall monitor the point of failure until a consecutive thirty (30) day period free of defects is achieved.
- 5.5 Re-Test: Awarded Vendor and DIR shall mutually agree to re-test per Paragraphs 5.1 through 5.3 above as determined by the environment where the issue is to be addressed. If the system has not operated for 30 consecutive days free of defects within the ninety (90)-day period, extend the test period by an amount of time equal to the greater of the downtime or the number of days required to complete the performance requirement of an individual point of failure.

**6.0 Change Management - Changes to GAP FIT Specifications**

If the modifications or enhancements described in the GAP FIT Analysis cannot be provided within the scheduled time frame documented in the Implementation Plan and Project Plan and Schedule, Awarded Vendor is required to contact DIR project manager in writing with a reason for the delay and the proposed revised schedule. The request for a revised schedule must include the impact on related tasks and the overall project. A request for a revised schedule must be reviewed and with written approval by the DIR before a revised Project Plan and Schedule become effective. DIR will cooperate with Awarded Vendor to maintain effective change control to the most possible extent. Change Control requests should be handled during the weekly status meetings as described in Section 9.0. Expenses for implementation and planning of changes needed due to Awarded Vendor's issues or Awarded Vendor's delay will be at no cost to DIR. Final decisions on what constitutes a "Change" will be the decision of the DIR Contract Manager

**7.0 Risk and Issue Management.** The following general procedure will be used to manage active project issues and risks:

- 7.1 DIR and Vendor Contract Manager will jointly identify and document project issues (current problems) and risks (potential events that impact the project).

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- 7.2 DIR will assess, analyze and prioritize the impact and determine the highest priority risks and issues that shall be managed actively, according to priority, by Awarded Vendor.
- 7.3 Awarded Vendor must plan and schedule high-priority risks and issues assigning responsibility for risk management and issue resolution in a documented risk register or issues log, as determined by DIR.
- 7.4 Awarded Vendor must track and report the status of risks, issues and communicate risk mitigation plans and issue resolutions using the risk register and issue log. See Section 9.0 for more details.
- 7.5 DIR will monitor and control the effectiveness of the risk and issue management actions.
- 7.6 Active issues and risks will be monitored and reassessed on a weekly basis by DIR and Awarded Vendor. Mutually agreed upon escalation and risk management processes will be defined at the outset of the project.

**8.0 Service Levels**

These Service Level Agreement guidelines will apply to the testing and acceptance period described in Section 5.0. Time and materials applied to fix Awarded Vendor defects will not be billed to DIR.

- 8.1 Meantime to Resolution (MTR): Upon verbal or written notification Awarded Vendor shall provide the following MTR's for defect resolution:
  - 8.1.1 Critical/blocker (system is down and non-usable – Severity One (1)) -- Respond within in one (1) hour, fix delivered in 24 hours.
  - 8.1.2 High (system is functional but suffering from significant impact to operations – Severity Two (2)) -- Respond in four (4) hours, fix delivered in 72 hours.
  - 8.1.3 Medium (system is functional, some impact to operations – Severity Three (3)) – Respond in eight (8) hours, Fix delivered in 10 days or less
  - 8.1.4 Low (minor issue, no impact to operations – Severity Four (4)) – Respond in 24 hours, Fixed delivered based on prioritization of planned releases.

**9.0 Required Reporting and Communication**

- 9.1 The parties will cooperate on the creation and maintenance of following Project Documentation:
  - 9.1.1 Project Plan and Schedule
  - 9.1.2 Implementation Plan
  - 9.1.3 System Design Document
  - 9.1.4 Change Control Weekly Report (to be used in scope management/change meeting).
  - 9.1.5 Rollback Plan for production deployments
  - 9.1.6 Risk and Issues Log.

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- 9.1.7 Written Weekly Status Reports which shall meet the following standards:
- a) Will be due to the DIR Contract Manager by the close of business on predetermined day each week throughout the life of the project.
  - b) Will cover all work performed and completed during the week for which the status report is provided and shall present the work to be performed during the subsequent week.
  - c) Shall identify any problems encountered or still outstanding with an explanation of the cause and resolution of the problem or how the problem is will be resolved.
  - d) Will reflect any Issue that is moving into Risk status.
- 9.2 DIR will provide a SharePoint Collaboration Site available to all appropriate project personnel to store and share all documentation generated during this project.
- 9.3 Awarded Vendor. The Vendor's Project Manager will be responsible for conducting weekly status meetings with the DIR Contract Manager and /or DIR Project Manager. The meetings will be held on a *predetermined day* of each week - at a time and place so designated by the DIR Contract Manager - unless revised by the DIR Contract Manager. The meetings can be in person, via the Web, or by phone at the discretion of the DIR Contract Manager.
- 9.4 Awarded Vendor shall attend one (1) Steering Committee Meeting per month.
- 9.5 Awarded Vendor and DIR will cooperate in attending any other needed meetings or submitting any other needed documentation as the parties see fit.

**10.0 Training**

- 10.1 Training is an important component of each Deliverable of this SOW. Awarded Vendor shall provide training programs for DIR personnel to acquire the necessary skills and proficiencies for utilizing the eProcurement Application and trainer certification program for DIR staff. The Awarded Vendor will supply this training prior to final sign-off of each Deliverable. All primary training provided shall be on DIR location to include web-based training program with individual modules to accommodate employees that were unable to attend live training. Training shall be interactive with an emphasis on appropriate development skills, and processing steps from development of an initial request through contract administration and shall have the ability to ask questions of the trainer during the sessions. The schedule of training sessions shall be coordinated with the DIR Contract Manager. Awarded Vendor shall provide, and update as necessary, all training documentation in the form of a user guide in both hardcopy and electronic format. The user guide shall be role-specific, e.g., System administrator, System users (Contract Manager, approver, and vendor), etc. The requirements of the training programs are as follows:
- 10.2 Program Administrator Training: The Program Administrator training shall be provided to select DIR personnel who shall be responsible for the daily operation and maintenance of the system. The training shall provide DIR personnel with the skills to include but may not be limited to database modifications, adds, deletions, downloads, approval authorities, creating reports, and assigning of users by levels of authority.
- 10.3 Contract Manager Training: The Contract Manager training shall be provided to Technology Sourcing Office staff who will need the complete understanding and process of each phase of the Application's modules. This shall include but may not

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be limited to creation of a solicitation, routing of approvals, posting and receipt by vendor, compliance review and evaluation stages and processes, through contract award.

- 10.4 Certified Training Program: The Certified Training Program shall be designed as a course that shall empower DIR to eventually assume responsibility for training personnel on the System. Personnel shall be given the skills required to teach other DIR personnel how to use the Application to its fullest potential. The training shall include advanced user techniques, basic technical troubleshooting skills, and server side support. This training shall be conducted at a mutually agreed upon location that shall provide the proper training atmosphere and accommodations and has the required training equipment. DIR shall reserve the right to require the training be conducted at DIR headquarters located in Austin, Texas if an off-site location cannot be mutually agreed upon

**11.0 Replacement of Personnel**

- 11.1 Vendor Key Personnel: Dedicated Vendor resources include but may not be limited to: Contract Manager, Project Manager, and Lead Technical Resource. These personnel should be considered Key Resources on this project and cannot be changed after project kickoff without the approval of DIR Contract and Project Managers.

- 11.2 All Vendor Resources: If DIR determines Awarded Vendor's employee or Awarded Vendor's subcontractor performing under this SOW is unable to perform in accordance with the service requirements or to communicate effectively, or is in the opinion of DIR, otherwise objectionable, Awarded Vendor shall immediately remove the employee or subcontractor and replace that resource within a mutually agreeable timeframe.

**12.0 Additional Services**

DIR Anticipates that the need may arise for the Vendor to perform additional services under this contract. Any additional services must be directly related to the awarded scope and intent of the SOW.

In the event that additional services are required during the term of the contract, DIR will provide written notice to the Vendor describing the additional services requested including as applicable to the purpose, scope, timeline and any other unique requirements, constraints, and assumptions for the requested service. The Vendor and DIR will mutually determine a timeline for the Vendor to provide a work plan and pricing for the additional services. Any additional services shall be quoted as a deliverables based IT service at a firm fixed price inclusive of any and all additional fees or charges. Pricing for labor hours associated with any additional services shall be based upon the hourly rates specified in Attachment B, Hourly Rates. A request for pricing does not constitute a notice to proceed. If DIR chooses to proceed, DIR will issue a written addendum to the contract for signature by DIR and the Vendor authorizing the additional services.

**13.0 Invoicing**

Payments will be made in accordance with Attachment B of the Contract.

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**14.0 Period of Performance**

The period of performance will be effective from the date of the Contract award for a period of one (1) year. DIR will have the option to renew the term of the Contract for one (1) additional one (1) year period, if needed to complete the awarded deliverables.

**15.0 Pricing**

The main purpose of this section is to detail the pricing for the deliverables-based services. Vendors should also provide a summary of any assumptions and exclusions. The Vendor must provide a separate cost for each Deliverable in this SOW. An Eight percent (8%) Cost Set-Aside is to be calculated against each Deliverable cost item. The total of the set-aside will make up cost for Deliverable 9, Project Closeout and Post-Implementation Support.

**16.0 Vendor Response**

Attachment B is attached that provides the responding Vendors with information and templates for their responses. Below is general information on DIR's expectations for those responses.

- 16.1 All written Deliverables must be phrased in terms and language that can be easily understood by non-technical personnel (e.g., laypersons without subject matter expertise)
- 16.2 All document Deliverables must be in formats (hard copy and electronic) as specified by the DIR - at a minimum, the formats must be in industry accepted standards (e.g., MS Word, MS PowerPoint, MS Project)
- 16.3 The Vendor must demonstrate its knowledge and expertise of the environment (e.g., platforms, software, applications, network, tools, etc.) for which work is to be performed

<b>FUNCTIONAL REQUIREMENTS</b>	<b>Section where this is outlined</b>
<b>GENERAL REQUIREMENTS</b>	
Ability to interface with Comptroller Software (ie. CMBL, NIGP codes) for vendor information and to extract procurement data	Section 4.1 - Deliverable 3
Ability to interface with the CAPPs Financial System (Oracle based) for reporting	Section 4.1 - Deliverable 3
Ability to incorporate data security features; e.g., sufficient security levels to preclude one agency user from accessing another agency's purchasing authority.	Section 4.2.2
Ability to have multiple levels of procurement delegation.	Section 4.2.2
Ability to automatically transfer information from one process to another without rekeying (i.e., solicitation, to contract, numbers, etc.).	Section 4.1 - Deliverable 3
Ability to clone and then amend documents (i.e., solicitations, contracts, statements of work or other document library items) eliminating the need to rekey data used previously.	Section 4.1 - Deliverable 3
Ability to link related documents within the system.	Section 4.1 - Deliverable 6
Licensed to use the NIGP Code structure with an online integration to nignp.com for download of NIGP Commodity Code update imports.	Section 4.1 - Deliverable 3
System is web-enabled and supports user authentication	Section 4.1 - All Deliverables
System has database structure that supports the NIGP Code.	Section 4.1 - Deliverable 3
System provides a consolidated database view	Section 4.1 - Deliverable 3
System has drill down search capability to search for class, to class-item, to class-item-group to class-item-group-detail.	Section 4.1 - Deliverable 3
System has keyword search across the NIGP descriptions, including the alias and synonym tables search like Item Description.	Section 4.1 - Deliverable 3
System has key word search.	Section 4.1 - Deliverable 3
System reporting provides capability to summarize data at NIGP class, class-item, class-item-group, and class-item-group-detail levels (5,7,11 digit).	Section 4.1 - Deliverable 3
Ability to establish and maintain information concerning vendors.	Section 4.1 - Deliverable 5
Ability to establish and maintain information concerning NIGP Commodity Code structure.	Section 4.1 - Deliverable 3
Ability to establish and maintain information concerning standards or specifications for items acquired.	Section 4.1 - Deliverable 3
Ability to establish and maintain information concerning standard text for terms and conditions for purchases.	Section 4.1 - Deliverable 3
Ability to record, report and maintain history for spending analysis of purchases, commodities, vendors and volumes. Integration with Vendor Sales Report data from Data Warehouse	Section 4.1 - Deliverable 8
Ability to support workflow for procurement approval process, including multiple approvals at the department, documents, dollar threshold amounts, commodity and account segments.	Section 4.1 - Deliverables 3 & 7
Ability to inquire as to the current status at any point in the "procurement chain."	Section 4.1 - Deliverable 4
Ability to generate workflow notifications if there are any delays or interruptions in the "procurement chain."	Section 4.1 - Deliverable 8
Ability to attach supporting documents and/or files to procurement-related records. At solicitation, evaluation, negotiation, contract development, etc..	Section 4.1 - Deliverable 7
Ability to delineate public documents from private documents and control access based on user role.	Section 4.1 - Deliverable 6
Ability to execute searches with flexible/complex search criteria on procurement information.	Section 4.1 - Deliverable 3
Supports ability to create customized reports and outputs.	Section 4.1 - All Deliverables

FUNCTIONAL REQUIREMENTS	Section where this is outlined
Ability to support document comparisons and redlining	Section 4.1 - Deliverable 3
Ability to support scheduling functions and display performance metrics (i.e. gantt charts )	Section 4.1 - All Deliverables
<b>VENDOR FILES</b>	
Ability for a vendor to enter their Federal Tax ID prior to registration for the purpose of checking to see if company is already registered. If so, Vendor User contact info is displayed.	Section 4.1 - Deliverable 5
Ability to support online vendor registration and the ability for the vendor to maintain their profile information online using a user TIN and password.	Section 4.1 - Deliverable 5
Vendor registration process can search for NIGP Codes to attach to the vendor profile.	Section 4.1 - Deliverable 5
Vendor profile can have unlimited NIGP Codes associated with it.	Section 4.1 - Deliverable 5
Vendor reporting can analyze spend data by NIGP Code and other vendor data elements (e.g., minority status).	Section 4.1 - Deliverable 5
Ability to differentiate between CMBL vendor account files and DIR vendor files for all modules in the system.	Section 4.1 - Deliverable 5
Ability to import vendors from external data sources.	Section 4.1 - Deliverable 5
Ability to store the following vendor data fields:	Section 4.1 - Deliverable 5
Legal Name	Section 4.1 - Deliverable 5
DBA Name	Section 4.1 - Deliverable 5
Vendor number (system-generated number)	Section 4.1 - Deliverable 5
Multiple addresses	Section 4.1 - Deliverable 5
Vendor e-mail & web site information	Section 4.1 - Deliverable 5
Contact person(s)	Section 4.1 - Deliverable 5
Federal Tax Identification Number (TIN) or Social Security Number (SSN)	Section 4.1 - Deliverable 5
1099 Type (e.g., Incorporated, Medical, Individual, Attorneys, etc.)	Section 4.1 - Deliverable 5
Phone and fax number(s)	Section 4.1 - Deliverable 5
Capability of creating user defined vendor categories such as minority/woman/disadvantaged business indicator, business type, regions, counties, business location (in-city/out of city) and capture vendor certification information:	Section 4.1 - Deliverable 5
Active/Inactive Status	Section 4.1 - Deliverable 5
Type of company (e.g., corporation, partnership, etc.)	Section 4.1 - Deliverable 5
NIGP Commodities	Section 4.1 - Deliverable 5
Other user-defined information	Section 4.1 - Deliverable 5
Ability to search the vendor file by specific vendor data fields.	Section 4.1 - Deliverable 5
Ability to delete (with appropriate security) or deactivate vendor from vendor listing.	Section 4.1 - Deliverable 5
Ability to integrate with Salesforce and allow vendor numbers (numeric and alphanumeric) be system generated or assigned manually.	Section 4.1 - Deliverable 5
Ability to search vendor files from within application (i.e. response, contract, amendment)	Section 4.1 Deliverable 5
Ability to maintain and report an accumulated purchase history for each vendor in system. (integrate with VSR)	Section 4.1 - Deliverable 8
Ability to change vendor name without losing the history.	Section 4.1 - Deliverable 5
Ability to detect duplicate vendor information upon entry of vendor information, by Tax ID number.	Section 4.1 - Deliverable 5
Ability to allow transactions to be completed only with vendors that are in the system	Section 4.1 - Deliverable 8
Ability to search and notify vendors based on vendor defined contact methods.	Section 4.1 Deliverables 5-8
Ability to purge, via system capability, vendors from list. (add/delete/revise vendor list)	Section 4.1 Deliverable 5

FUNCTIONAL REQUIREMENTS	Section where this is outlined
<b>SOLICITATION PROCESSING</b>	
Ability to create solicitations from other documents (solicitations), from scratch or renew contracts.	Section 4.1 - Deliverable 3
Ability to search for documents and add items or the entire document to the solicitation.	Section 4.1 - Deliverable 3
Ability to select vendors based on NIGP commodity number, vendor categories(like HUB), location, emergency supplier designation.	Section 4.1 - Deliverable 3
Ability to select vendors and add to solicitation vendor list by other search means.	Section 4.1 - Deliverable 3
Ability for vendors to respond electronically and have the response encrypted and lock boxed until the opening date and time.	Section 4.1 - Deliverable 6
Ability for vendors to withdraw a solicitation response from the lockbox and modify/re-submit prior to opening date and time of the solicitation.	Section 4.1 - Deliverable 5-7
Ability to submit alternate quotes by line item for a solicitation (Best and Final Offer)	Section 4.1 - Deliverable 7
Ability to create user defined interrogatories at the item and header level. Questions can be made optional or mandatory. Vendor online responses cannot be submitted unless all mandatory questions are answered.	Section 4.1 - Deliverable 6
Ability to auto-attach documents to the solicitation upon solicitation creation, e.g., terms and conditions.	Section 4.1 - Deliverable 6
Ability to allow vendors to submit questions to the Contract Manager online and allow the Contract Manager to enter vendor questions received by other means and post the questions and responses online.	Section 4.1 - Deliverable 6
Ability to create a solicitation package using prior solicitations.	Section 4.1 - Deliverable 3
Ability for a solicitation to go through an approval path prior to being released. The solicitation shall have a solicitation available date, upon which it will be made available online after all approvals are completed.	Section 4.1 - Deliverable 3
Ability to amend a solicitation and automatically notify vendors.	Section 4.1 - Deliverable 3
Ability to post solicitation documents to a public internet site (e.g. ESBD).	Section 4.1 - Deliverable 8
<b>BID TABULATION</b>	
Ability to tabulate solicitations after solicitation opening and apply scoring preferences/penalties based on vendor categories.	Section 4.1 - Deliverable 7
Ability to print or export Bid Tabulation reflecting as a minimum line item unit price, vendor information, HUB status, total of award, split awards, cross reference, comments.	Section 4.1 - Deliverable 7
Ability to change vendor point of contact, HUB status, address or phone number at Bid Tabulation.	Section 4.1 - Deliverable 7
Ability to indicate awarded vendor and print bid tabulation.	Section 4.1 - Deliverable 7
Ability to carry over or enter manual line item unit prices on bid tab.	Section 4.1 - Deliverable 7
Ability to add new vendor to solicitation at bid tab.	Section 4.1 - Deliverable 7
Ability at bid tab to carry over only those vendors who responded.	Section 4.1 - Deliverable 7
Ability to add comments.	Section 4.1 - Deliverable 7
Ability to split one solicitation into multiple awards. The system shall provide the ability to sole source to one vendor, recommend awards to multiple vendors for the same item, or single award of an item to a single vendor.	Section 4.1 - Deliverable 7
Ability to provide a means to create evaluation teams for RFP evaluation.	Section 4.1 - Deliverable 7
Ability for weighted or point scoring for RFP's.	Section 4.1 - Deliverable 7
Ability for evaluation team members to record their notes regarding a vendor's score.	Section 4.1 - Deliverable 7

<b>FUNCTIONAL REQUIREMENTS</b>	<b>Section where this is outlined</b>
Ability for the evaluation team to enter raw scores for the evaluation criteria for the award and the system to calculate a weighted average score across evaluation criteria and scorers.	Section 4.1 - Deliverable 7
Ability to route the award recommendation through approvals prior to creation of the awarded Contract(s).	Section 4.1 - Deliverable 7
Ability to auto convert award recommendation to Contract without rekeying data.	Section 4.1 - Deliverable 7
Ability to post award and non-award (unsuccessfuls) associated with the closed solicitation/RFP for public viewing.	Section 4.1 - Deliverable 7
Ability to post evaluation reports for public viewing.	Section 4.1 - Deliverable 8
<b>SUBCONTRACTOR PROCESSING</b>	
Ability to express a preference for subcontractor participation by the prime on the solicitation.	Section 4.1 - Deliverable 7
Ability to specify a percentage participation by subcontractors.	Section 4.1 - Deliverable 7
Ability to specify vendor categories for subcontractor participation.	Section 4.1 - Deliverable 7
Ability for vendors to identify subcontractors as part of their online solicitation response.	Section 4.1 - Deliverable 7
Ability for vendors to identify the subcontractor's projected participation.	Section 4.1 - Deliverable 7
Ability for vendors to identify the vendor category (minority, women owned, non-HUB) for which the subcontractor is fulfilling a requirement.	Section 4.1 - Deliverable 7
Ability to tabulate vendor subcontractor responses, comparing projected participation levels by vendor category with solicitation preferred participation levels.	Section 4.1 - Deliverable 7
<b>CONTRACT ADMINISTRATION</b>	
Ability to convert awarded solicitation, including multiple and split awards, to approved contract(s).	Section 4.1 - Deliverable 7
Ability to track multiple concurrent contracts per vendor.	Section 4.1 - Deliverable 7
Ability to amend contract at line item values, quantity, description.	Section 4.1 - Deliverable 7
Ability to attach documents to a contract.	Section 4.1 - Deliverable 3 and 7
Ability to support both line item contracts and discount from list price agreements.	Section 4.1 - Deliverable 7
Ability to track contracts by user defined criteria, such as: vendor, date (starting, ending), dollars, NIGP Commodity Codes, and contract number(s).	Section 4.1 - Deliverable 7
Ability to designate prime vendor and associate other vendors as subcontractors and also identify the projected percentage the subcontractor will receive.	Section 4.1 - Deliverable 7
Ability to activate/deactivate vendors as subcontractors and track active/inactive dates as a subcontractor.	Section 4.1 - Deliverable 7
Ability to create reminders and ticklers to be associated with the document, e.g., insurance requirements, bonding, contract expiration, dollar thresholds.	Section 4.1 - Deliverable 7
Ability to track and flag contract expiration/extension dates. Provide the ability to set flag timing to build in lead time to extend or re-solicit the contract.	Section 4.1 - Deliverable 7
Ability to automatically assign contract numbers to contracts (based upon user defined criteria).	Section 4.1 - Deliverable 3
Ability to store and maintain contract historical information, including but not limited to the following details:	Section 4.1 - Deliverable 7
Dollar value	Section 4.1 - Deliverable 7
Start/end and extension dates	Section 4.1 - Deliverable 7
Expiration dates	Section 4.1 - Deliverable 7
PCC, Legal site, associated uploaded documents	Section 4.1 - Deliverable 7
Vendor/customer information	Section 4.1 - Deliverable 7

<b>FUNCTIONAL REQUIREMENTS</b>		<b>Section where this is outlined</b>
Contract number		Section 4.1 - Deliverable 7
Contract Administrator's name, phone, fax numbers and email		Section 4.1 - Deliverable 7
Ability for contract periods to be user defined and include contract year, fiscal year, and contract term for those contracts which span multiple fiscal years.		Section 4.1 - Deliverable 7
Ability to track and remove or flag for removal documents no longer needed as part of records retention		Section 4.1 - Deliverable 7
Ability to provide for an automatic transfer to a specific contractor site via a contract link ('punch out') to enable easy access to contract catalog product items, descriptions and pricing.		Section 4.1 - Deliverable 7
<b>REPORTING / QUERYING</b>		
Ability to produce the following reports:		Section 4.1 - All Deliverables
Purchases from Historically Underutilized Business (MBE/WBE/DBE) vendors		Section 4.1 - All Deliverables
Vendor performance report		Section 4.1 - All Deliverables
Ability to generate vendor reports based upon user defined criteria.		Section 4.1 - All Deliverables
Ability to track or report on contract data.		Section 4.1 - All Deliverables
Ability for users to query all transactions for progress within the system.		Section 4.1 - All Deliverables
Ability to create new report specs and share the spec with other users. Should be able to modify a standard into something new.		Section 4.1 - All Deliverables
Ability to save custom report specs so they do not have to be recreated.		Section 4.1 - All Deliverables
Ability to output a report into Excel, PDF, XML, DOC file formats.		Section 4.1 - All Deliverables
<b>System is licensed to use the NIGP Code within the application. (YES/NO)</b>		Section 4.1 - All Deliverables
<b>OFFEROR PROPOSED ADDITIONAL FUNCTIONALITIES</b>		
<b>OFFEROR DESCRIBE FUNCTIONALITY (Add lines for additional functionalities as needed.)</b>		



## Attachment B

### Mandatory Documentation

#### 1. Vendor staff capabilities specific to this SOW

- a. Organization chart
- b. Management team resumes
- c. Key personnel resumes

#### 2. Response Submission Details

- a. SOW Release Date – 7/20/2016
- b. Mandatory Vendor Demonstration of DIR's infrastructure 7/25/2016 (See cover letter)
- c. Deadline for questions – 07/27/2016 5:00PM CT
- d. Deadline for answering questions – 08/01/2016
- e. Response due date – 08/17/2016 5:00PM CT
- f. Address for response submission – [shannon.kelley@dir.texas.gov](mailto:shannon.kelley@dir.texas.gov)

#### 3. Delivery Schedule

No.	Item	SOW Paragraph	Proposed Level of Effort in Business Days	Proposed Start Date	Proposed End Date
1	Project Preparatory Work	4.1 Deliverable 1		9/1/2016	
2	Suggestion Site	4.1 Deliverable 2			
3	Solicitation Library	4.1 Deliverable 3			
4	Contract Administration and Usage Tracking	4.1 Deliverable 4			
5	Vendor Information Systems	4.1 Deliverable 5			
6	Solicitation Responses	4.1 Deliverable 6			
7	Evaluation and Tabulation	4.1 Deliverable 7			
8	Contract Award, Auditing and Reporting	4.1 Deliverable 8			
9	Project Closeout and Post-Implementation Support	4.1 Deliverable 9			

**4. Pricing**

The main purpose of this section is to detail the pricing for the deliverables-based services. Vendors should also provide a summary of any assumptions and exclusions. An Eight percent (8%) Cost Set-Aside is calculated against each Deliverable cost item. The total of the set-aside will make up cost for the ninety day (90 day) post production support period previously mentioned in the SOW. The Awarded Vendor may invoice the Billable Cost less the Set-Aside once DIR has signed off on each deliverable.

**5. Vendor Pricing Template**

**Pricing for deliverables shall be as indicated below:**

Deliverable No.	Deliverable Name	Deliverable Cost	8% Cost Set -Aside*	Billable Cost at Sign-off **
1	Project Preparatory Work			
2	Suggestion Site			
3	Solicitation Library			
4	Contract Administration and Usage Tracking			
5	Vendor Information Systems			
6	Solicitation Responses			
7	Evaluation and Tabulation			
8	Contract Award, Auditing and Reporting			
9	Project Closeout and Post-Implementation Support ***			
<b>Contract total costs</b>				

**Notes:**

(\*) Equals eight (8) percent of Deliverable Cost of each Deliverable

(\*\*) Equals Deliverable Cost minus the 8% Set-Back

(\*\*\*) Equals the total of all Set-Back amounts. Put amount in last column

**5.1. Hourly Rates**

For the purposes for additional work that may be determined to be required as specified in Section 12.0, Additional Services, the following hourly rates shall apply for each staff role/function that may be required under this SOW.

Role/Function	Hourly Rate

## **6. Sample Documentation**

Vendors responding to this SOW are encouraged to provide samples of these types of documentation to show their competencies this type of project:

- a. Narrative on your capability to deliver the required services, including process, functional and technical expertise including a list any previous experience managing government services contracts.
  - b. Sample Project plans for project of similar size or scope(\*).
  - c. Sample architectural documentation from previous projects(\*)
  - d. Provide their methodology for testing
  - e. Project management plan addressing the tasks specified in the SOW
- (\*) You are welcome redact any information from these types of sample documents.

**DIR-TSO-TMP-XXX**  
Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
<b>Acme A</b>	Vendor J	20.00%	45.00	47.50	<b>92.50</b>		To Negotiation
	Vendor JJ	5.00%	11.25	49.00	<b>60.25</b>	32.25	
	Vendor SS	2.00%	4.50	49.50	<b>54.00</b>	38.50	
<b>Acme B</b>	Vendor YY	5.00%	45.00	46.50	<b>91.50</b>		To Negotiation
	Vendor MM	4.00%	36.00	39.88	<b>75.88</b>	15.62	
<b>Acme C</b>	Vendor U	41.00%	41.93	49.83	<b>91.76</b>		To Negotiation
	Vendor BBB	40.00%	40.91	48.33	<b>89.24</b>	2.52	To Negotiation
	Vendor V	37.50%	38.35	47.50	<b>85.85</b>	5.91	To Negotiation
	Vendor SS	37.00%	37.84	49.50	<b>87.34</b>	5.43	To Negotiation
	Vendor JJ	36.50%	37.33	49.00	<b>86.33</b>	5.43	To Negotiation
	Vendor EEE	44.00%	45.00	37.83	<b>82.83</b>	8.93	To Negotiation
	Vendor H	35.00%	35.80	45.17	<b>80.97</b>	10.80	
	Vendor YY	30.00%	30.68	46.50	<b>77.18</b>	14.58	
	Vendor X	25.00%	25.57	47.83	<b>73.40</b>	18.36	
	Vendor Q	32.00%	32.73	41.05	<b>73.78</b>	17.98	
	Vendor D	25.00%	25.57	43.68	<b>69.25</b>	22.51	
<b>Acme D</b>	Vendor V	30.00%	45.00	47.50	<b>92.50</b>		To Negotiation
	Vendor BBB	15.00%	22.50	48.33	<b>70.83</b>	21.67	
<b>Acme E</b>	Vendor BBB	43.00%	43.98	48.33	<b>92.31</b>		To Negotiation
	Vendor V	42.00%	42.95	47.50	<b>90.45</b>	1.85	To Negotiation
	Vendor SS	39.50%	40.40	49.50	<b>89.90</b>	2.41	To Negotiation
	Vendor UU	40.00%	40.91	48.83	<b>89.74</b>	2.57	To Negotiation
	Vendor JJ	39.00%	39.89	49.00	<b>88.89</b>	3.42	To Negotiation
	Vendor H	40.00%	40.91	45.17	<b>86.08</b>	6.23	To Negotiation
	Vendor I	40.00%	40.91	44.00	<b>84.91</b>	7.40	To Negotiation
	Vendor EEE	44.00%	45.00	37.83	<b>82.83</b>	9.48	To Negotiation
	Vendor Q	32.00%	32.73	41.05	<b>73.78</b>	18.53	
	Vendor YY	20.00%	20.45	46.50	<b>66.95</b>	25.35	
<b>Acme F</b>	Vendor SS	15.00%	45.00	49.50	<b>94.50</b>		To Negotiation
	Vendor BBB	15.00%	45.00	48.33	<b>93.33</b>	1.17	To Negotiation

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Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xtation</b>
	Vendor Q	8.00%	24.00	41.05	<b>65.05</b>	29.45	
<b>Acme G</b>	<b>Vendor H</b>	<b>38.00%</b>	<b>45.00</b>	<b>45.17</b>	<b>90.17</b>		<b>To Negotiation</b>
	Vendor Q	7.00%	8.29	41.05	<b>49.34</b>	40.83	
<b>Acme H</b>	<b>Vendor YY</b>	<b>30.00%</b>	<b>45.00</b>	<b>46.50</b>	<b>91.50</b>		<b>To Negotiation</b>
	Vendor L	15.00%	22.50	49.83	<b>72.33</b>	19.17	
	Vendor SS	12.00%	18.00	49.50	<b>67.50</b>	24.00	
<b>Acme I</b>	<b>Vendor YY</b>	<b>20.00%</b>	<b>45.00</b>	<b>46.50</b>	<b>91.50</b>		<b>To Negotiation</b>
	Vendor XX	16.00%	36.00	43.67	<b>79.67</b>	11.83	
	Vendor D	12.50%	28.13	43.68	<b>71.81</b>	19.70	
	Vendor NN	15.81%	35.57	37.00	<b>72.57</b>	18.93	
	Vendor Q	13.00%	29.25	41.05	<b>70.30</b>	21.20	
<b>Acme J</b>	<b>Vendor BBB</b>	<b>35.00%</b>	<b>45.00</b>	<b>48.33</b>	<b>93.33</b>		<b>To Negotiation</b>
	Vendor YY	35.00%	45.00	46.50	<b>91.50</b>	1.83	<b>To Negotiation</b>
	Vendor U	29.00%	37.29	49.83	<b>87.12</b>	6.21	<b>To Negotiation</b>
	Vendor LL	25.00%	32.14	35.67	<b>67.81</b>	25.52	
	Vendor GG	25.00%	32.14	34.67	<b>66.81</b>	26.52	
<b>Acme K</b>	<b>Vendor SS</b>	<b>40.00%</b>	<b>45.00</b>	<b>49.50</b>	<b>94.50</b>		<b>To Negotiation</b>
	Vendor V	40.00%	45.00	47.50	<b>92.50</b>	2.00	<b>To Negotiation</b>
	Vendor BBB	39.00%	43.88	48.33	<b>92.21</b>	2.30	<b>To Negotiation</b>
	Vendor HHH	38.00%	42.75	48.67	<b>91.42</b>	3.08	<b>To Negotiation</b>
	Vendor XX	35.00%	39.38	43.67	<b>83.05</b>	11.46	
	Vendor NN	37.69%	42.40	37.00	<b>79.40</b>	15.10	
	Vendor II	28.00%	31.50	43.00	<b>74.50</b>	20.00	
	Vendor Q	28.00%	31.50	41.05	<b>72.55</b>	21.95	
	Vendor JJJ	20.00%	22.50	48.33	<b>70.83</b>	23.67	
	Vendor YY	20.00%	22.50	46.50	<b>69.00</b>	25.50	
	Vendor R	16.00%	18.00	50.00	<b>68.00</b>	26.50	
	Vendor LL	26.00%	29.25	35.67	<b>64.92</b>	29.58	
	Vendor RR	15.00%	16.88	46.50	<b>63.38</b>	31.13	
	Vendor GG	25.00%	28.13	34.67	<b>62.80</b>	31.71	

**DIR-TSO-TMP-XXX  
Name of Solicitation**

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor D	15.00%	16.88	43.68	<b>60.56</b>	33.95	
<b>Acme L</b>	Vendor R	43.00%	45.00	50.00	<b>95.00</b>		To Negotiation
	Vendor UU	35.00%	36.63	48.83	<b>85.46</b>	9.54	To Negotiation
	Vendor SS	30.00%	31.40	49.50	<b>80.90</b>	14.10	
	Vendor Q	32.00%	33.49	41.05	<b>74.54</b>	20.46	
	Vendor H	25.00%	26.16	45.17	<b>71.33</b>	23.67	
	Vendor YY	20.00%	20.93	46.50	<b>67.43</b>	27.57	
<b>Acme L</b>	Vendor SS	10.00%	37.50	49.50	<b>87.00</b>		To Negotiation
	Vendor Q	12.00%	45.00	41.05	<b>86.05</b>	0.95	To Negotiation
<b>Acme M</b>	Vendor YY	25.00%	48.91	46.50	<b>95.41</b>		To Negotiation
	Vendor R	23.00%	45.00	50.00	<b>95.00</b>	0.41	To Negotiation
	Vendor XX	17.00%	33.26	43.67	<b>76.93</b>	18.07	
<b>Acme N</b>	Vendor S	24.00%	43.20	50.83	<b>94.03</b>		To Negotiation
	Vendor SS	21.00%	37.80	49.50	<b>87.30</b>	6.73	To Negotiation
	Vendor UU	21.00%	37.80	48.83	<b>86.63</b>	7.40	To Negotiation
	Vendor JJ	20.50%	36.90	49.00	<b>85.90</b>	8.13	To Negotiation
	Vendor CCC	19.50%	35.10	50.50	<b>85.60</b>	8.43	To Negotiation
	Vendor KK	25.00%	45.00	37.33	<b>82.33</b>	11.70	
	Vendor LL	25.00%	45.00	35.67	<b>80.67</b>	13.36	
	Vendor U	12.00%	21.60	49.83	<b>71.43</b>	22.60	
	Vendor Q	16.00%	28.80	41.05	<b>69.85</b>	24.18	
	Vendor RR	11.83%	21.29	46.50	<b>67.79</b>	26.24	
	Vendor GGG	13.00%	23.40	40.00	<b>63.40</b>	30.63	
	Vendor V	10.00%	18.00	47.50	<b>65.50</b>	28.53	
	Vendor YY	10.00%	18.00	46.50	<b>64.50</b>	29.53	
	Vendor P	10.00%	18.00	42.00	<b>60.00</b>	34.03	
	Vendor FF	8.00%	14.40	23.33	<b>37.73</b>	56.30	
<b>Acme O</b>	Vendor SS	22.00%	45.00	49.50	<b>94.50</b>		To Negotiation
	Vendor JJ	20.00%	40.91	49.00	<b>89.91</b>	4.59	To Negotiation
	Vendor FF	17.00%	34.77	23.33	<b>58.10</b>	36.40	

**DIR-TSO-TMP-XXX**  
Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
<b>Acme P</b>	Vendor SS	20.00%	45.00	49.50	<b>94.50</b>		To Negotiation
	Vendor D	15.00%	33.75	43.68	<b>77.43</b>	17.07	
<b>Acme Q</b>	Vendor H	40.00%	45.00	45.17	<b>90.17</b>		To Negotiation
	Vendor BBB	29.00%	32.63	48.33	<b>80.96</b>	9.22	To Negotiation
	Vendor D	26.00%	29.25	43.68	<b>72.93</b>	17.24	
<b>Acme R</b>	Vendor S	42.50%	45.00	50.83	<b>95.83</b>		To Negotiation
	Vendor BBB	42.00%	44.47	48.33	<b>92.80</b>	3.03	To Negotiation
	Vendor R	38.00%	40.24	50.00	<b>90.24</b>	5.59	To Negotiation
	Vendor H	35.00%	37.06	45.17	<b>82.23</b>	13.60	
	Vendor SS	30.00%	31.76	49.50	<b>81.26</b>	14.57	
	Vendor NN	34.50%	36.53	37.00	<b>73.53</b>	22.30	
	Vendor Q	30.00%	31.76	41.05	<b>72.81</b>	23.02	
	Vendor P	28.33%	30.00	42.00	<b>72.00</b>	23.83	
	Vendor E	20.00%	21.18	45.67	<b>66.85</b>	28.98	
	Vendor YY	17.00%	18.00	46.50	<b>64.50</b>	31.33	
	Vendor X	14.50%	15.35	47.83	<b>63.18</b>	32.65	
	Vendor EEE	22.00%	23.29	37.83	<b>61.12</b>	34.71	
<b>Acme S</b>	Vendor Q	32.00%	45.00	41.05	<b>86.05</b>		To Negotiation
	Vendor BB	22.00%	30.94	48.50	<b>79.44</b>	6.61	To Negotiation
	Vendor JJ	10.00%	14.06	49.00	<b>63.06</b>	22.99	
<b>Acme T</b>	Vendor SS	20.00%	45.00	49.50	<b>94.50</b>		To Negotiation
	Vendor D	10.00%	22.50	43.68	<b>66.18</b>	28.32	
<b>Acme U</b>	Vendor BBB	30.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor SS	15.00%	22.50	49.50	<b>72.00</b>	21.33	
<b>Acme V</b>	Vendor YY	10.00%	45.00	46.50	<b>91.50</b>		To Negotiation
	Vendor SS	0.75%	3.38	49.50	<b>52.88</b>	38.63	
<b>Acme W</b>	Vendor R	20.00%	45.00	50.00	<b>95.00</b>		To Negotiation
	Vendor YY	15.00%	33.75	46.50	<b>80.25</b>	14.75	

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**Name of Solicitation**

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor Q	12.00%	27.00	41.05	<b>68.05</b>	26.95	
	Vendor H	10.00%	22.50	45.17	<b>67.67</b>	27.33	
	Vendor D	10.00%	22.50	43.68	<b>66.18</b>	28.82	
<b>Acme X</b>	Vendor Q	32.00%	45.00	41.05	<b>86.05</b>		To Negotiation
	Vendor SS	25.00%	35.16	49.50	<b>84.66</b>	1.39	To Negotiation
	Vendor JJ	21.50%	30.23	49.00	<b>79.23</b>	6.82	To Negotiation
	Vendor P	25.00%	35.16	42.00	<b>77.16</b>	8.89	To Negotiation
<b>Acme Y</b>	Vendor H	40.00%	45.00	45.17	<b>90.17</b>		To Negotiation
	Vendor V	30.00%	33.75	47.50	<b>81.25</b>	8.92	To Negotiation
	Vendor FF	28.76%	32.36	23.33	<b>55.69</b>	34.49	
<b>Acme Z</b>	Vendor R	35.00%	45.00	50.00	<b>95.00</b>		To Negotiation
	Vendor BBB	35.00%	45.00	48.33	<b>93.33</b>	1.67	To Negotiation
	Vendor H	35.00%	45.00	45.17	<b>90.17</b>	4.83	To Negotiation
	Vendor Q	31.00%	39.86	41.05	<b>80.91</b>	14.09	
	Vendor JJJ	20.00%	25.71	48.33	<b>74.04</b>	20.96	
<b>Acme AA</b>	Vendor L	31.00%	45.00	49.83	<b>94.83</b>		To Negotiation
	Vendor U	25.00%	36.29	49.83	<b>86.12</b>	8.71	To Negotiation
	Vendor O	30.00%	43.55	34.50	<b>78.05</b>	16.78	
	Vendor GG	25.00%	36.29	34.67	<b>70.96</b>	23.87	
<b>Acme AB</b>	Vendor H	25.00%	39.12	45.17	<b>84.29</b>		To Negotiation
	Vendor FF	28.76%	45.00	23.33	<b>68.33</b>	15.96	
<b>Acme AC</b>	Vendor H	32.00%	45.00	45.17	<b>90.17</b>		To Negotiation
	Vendor SS	20.00%	28.13	49.50	<b>77.63</b>	12.55	
<b>Acme AD</b>	Vendor H	5.50%	45.00	44.50	<b>89.50</b>		To Negotiation
	Vendor EE	5.00%	40.91	39.33	<b>80.24</b>	9.26	To Negotiation
<b>Acme AE</b>	Vendor BBB	38.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor BB	22.00%	26.05	48.50	<b>74.55</b>	18.78	

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Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor YY	20.00%	23.68	46.50	<b>70.18</b>	23.15	
	Vendor Q	19.00%	22.50	41.05	<b>63.55</b>	29.78	
<b>Acme AF</b>	Vendor JJ	44.50%	42.61	49.00	<b>91.61</b>		To Negotiation
	Vendor EEE	47.00%	45.00	37.83	<b>82.83</b>	8.78	To Negotiation
	Vendor Q	31.00%	29.68	41.05	<b>70.73</b>	20.88	
<b>Acme AG</b>	Vendor YY	30.00%	45.00	46.50	<b>91.50</b>		To Negotiation
	Vendor EEE	12.00%	18.00	37.83	<b>55.83</b>	35.67	
<b>Acme AH</b>	Vendor BBB	32.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor YY	30.00%	42.19	46.50	<b>88.69</b>	4.64	To Negotiation
<b>Acme AI</b>	Vendor BBB	34.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor YY	30.00%	39.71	46.50	<b>86.21</b>	7.12	To Negotiation
<b>Acme AJ</b>	Vendor Q	36.00%	45.00	41.05	<b>86.05</b>		To Negotiation
	Vendor O	35.00%	43.75	34.50	<b>78.25</b>	7.80	To Negotiation
<b>Acme AK</b>	Vendor V	42.00%	45.00	47.50	<b>92.50</b>		To Negotiation
	Vendor BBB	40.00%	42.86	48.33	<b>91.19</b>	1.31	To Negotiation
	Vendor I	40.00%	42.86	44.00	<b>86.86</b>	5.64	To Negotiation
<b>Acme AL</b>	Vendor BBB	32.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor YY	30.00%	42.19	46.50	<b>88.69</b>	4.64	To Negotiation
	Vendor D	27.00%	37.97	43.68	<b>81.65</b>	11.68	
	Vendor EEE	30.00%	42.19	37.83	<b>80.02</b>	13.31	
	Vendor U	20.00%	28.13	49.83	<b>77.96</b>	15.38	
	Vendor SS	20.00%	28.13	49.50	<b>77.63</b>	15.71	
	Vendor Q	20.00%	28.13	41.05	<b>69.18</b>	24.16	
	Vendor GG	25.00%	35.16	34.67	<b>69.83</b>	23.50	
<b>Acme AM</b>	Vendor BB	25.00%	45.00	48.50	<b>93.50</b>		To Negotiation
	Vendor BBB	20.00%	36.00	48.33	<b>84.33</b>	9.17	To Negotiation
	Vendor JJ	12.00%	21.60	49.00	<b>70.60</b>	22.90	

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Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor YY	11.93%	21.47	46.50	<b>67.97</b>	25.53	
	Vendor H	10.00%	18.00	45.17	<b>63.17</b>	30.33	
	Vendor SS	6.50%	11.70	49.50	<b>61.20</b>	32.30	
	Vendor Q	1.00%	1.80	41.05	<b>42.85</b>	50.65	
<b>Acme AN</b>	Vendor D	20.00%	45.00	43.68	<b>88.68</b>		To Negotiation
	Vendor YY	15.00%	33.75	46.50	<b>80.25</b>	8.43	To Negotiation
	Vendor BBB	10.00%	22.50	48.33	<b>70.83</b>	17.85	
<b>Acme AO</b>	Vendor BBB	15.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor D	12.00%	36.00	43.68	<b>79.68</b>	13.65	
	Vendor CC	10.00%	30.00	48.67	<b>78.67</b>	14.66	
	Vendor YY	10.00%	30.00	46.50	<b>76.50</b>	16.83	
	Vendor U	6.00%	18.00	49.83	<b>67.83</b>	25.50	
	Vendor SS	5.00%	15.00	49.50	<b>64.50</b>	28.83	
	Vendor Q	7.00%	21.00	41.05	<b>62.05</b>	31.28	
<b>Acme AP</b>	Vendor BBB	28.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor SS	25.00%	40.18	49.50	<b>89.68</b>	3.65	To Negotiation
<b>Acme AQ</b>	Vendor L	29.00%	45.00	49.83	<b>94.83</b>		To Negotiation
	Vendor S	26.25%	40.73	50.83	<b>91.56</b>	3.27	To Negotiation
	Vendor JJ	26.50%	41.12	49.00	<b>90.12</b>	4.71	To Negotiation
	Vendor SS	19.64%	30.48	49.50	<b>79.98</b>	14.85	
	Vendor TT	26.50%	41.12	38.00	<b>79.12</b>	15.71	
	Vendor OO	17.00%	26.38	44.50	<b>70.88</b>	23.95	
	Vendor P	15.00%	23.28	42.00	<b>65.28</b>	29.55	
	Vendor Q	13.00%	20.17	41.05	<b>61.22</b>	33.61	
<b>Acme AR</b>	Vendor D	15.00%	45.00	43.68	<b>88.68</b>		To Negotiation
	Vendor YY	10.00%	30.00	46.50	<b>76.50</b>	12.18	
	Vendor BBB	6.00%	18.00	48.33	<b>66.33</b>	22.35	
<b>Acme AS</b>	Vendor BBB	34.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor J	20.00%	26.47	47.50	<b>73.97</b>	19.36	

**DIR-TSO-TMP-XXX**  
Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
<b>Acme AT</b>	Vendor HH	28.00%	45.00	44.33	<b>89.33</b>		To Negotiation
	Vendor F	12.50%	20.09	43.33	<b>63.42</b>	25.91	
<b>Acme AU</b>	Vendor BBB	12.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor CCC	11.00%	41.25	50.50	<b>91.75</b>	1.58	To Negotiation
<b>Acme AV</b>	Vendor L	40.00%	42.86	49.83	<b>92.69</b>		To Negotiation
	Vendor UU	40.00%	42.86	48.83	<b>91.69</b>	1.00	To Negotiation
	Vendor YY	40.00%	42.86	46.50	<b>89.36</b>	3.33	To Negotiation
	Vendor BBB	38.00%	40.71	48.33	<b>89.04</b>	3.65	To Negotiation
	Vendor Q	42.00%	45.00	41.05	<b>86.05</b>	6.64	To Negotiation
	Vendor JJ	33.50%	35.89	49.00	<b>84.89</b>	7.80	To Negotiation
	Vendor KK	34.03%	36.46	37.33	<b>73.79</b>	18.90	
	Vendor BB	22.00%	23.57	48.50	<b>72.07</b>	20.62	
	Vendor SS	16.67%	17.86	49.50	<b>67.36</b>	25.33	
	Vendor H	12.00%	12.86	45.17	<b>58.03</b>	34.66	
<b>Acme AW</b>	Vendor W	39.00%	45.00	44.50	<b>89.50</b>		To Negotiation
	Vendor BBB	35.00%	40.38	48.33	<b>88.71</b>	0.79	To Negotiation
	Vendor BB	22.00%	25.38	48.50	<b>73.88</b>	15.62	
	Vendor JJ	10.00%	11.54	49.00	<b>60.54</b>	28.96	
<b>Acme AX</b>	Vendor CC	10.00%	45.00	48.67	<b>93.67</b>		To Negotiation
	Vendor MMM	4.89%	22.01	37.83	<b>59.84</b>	33.84	
<b>Acme AY</b>	Vendor BBB	35.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor V	35.00%	45.00	47.50	<b>92.50</b>	0.83	To Negotiation
	Vendor SS	21.50%	27.64	49.50	<b>77.14</b>	16.19	
	Vendor BB	22.00%	28.29	48.50	<b>76.79</b>	16.54	
	Vendor W	22.75%	29.25	44.50	<b>73.75</b>	19.58	
	Vendor XX	22.00%	28.29	43.67	<b>71.96</b>	21.37	
	Vendor EEE	12.00%	15.43	37.83	<b>53.26</b>	40.07	
	Vendor Q	3.00%	3.86	41.05	<b>44.91</b>	48.42	

**DIR-TSO-TMP-XXX**  
**Name of Solicitation**

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
<b>Acme AZ</b>	Vendor BBB	14.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor HHH	10.00%	7.03	48.67	<b>55.70</b>	37.63	
<b>Acme BA</b>	Vendor R	48.00%	45.00	50.00	<b>95.00</b>		To Negotiation
	Vendor W	27.00%	25.31	44.50	<b>69.81</b>	25.19	
<b>Acme BB</b>	Vendor BBB	20.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor H	20.00%	45.00	45.17	<b>90.17</b>	3.16	To Negotiation
	Vendor D	15.00%	33.75	43.68	<b>77.43</b>	15.90	
	Vendor U	10.00%	22.50	49.83	<b>72.33</b>	21.00	
	Vendor JJ	10.00%	22.50	49.00	<b>71.50</b>	21.83	
	Vendor Q	1.00%	2.25	41.05	<b>43.30</b>	50.03	
<b>Acme BC</b>	Vendor BBB	29.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor JJ	28.00%	43.45	49.00	<b>92.45</b>	0.88	To Negotiation
<b>Acme BD</b>	Vendor A	19.61%	38.37	51.50	<b>89.87</b>		To Negotiation
	Vendor D	23.00%	45.00	43.68	<b>88.68</b>	1.19	To Negotiation
	Vendor HH	20.00%	39.13	44.33	<b>83.46</b>	6.41	To Negotiation
	Vendor F	10.00%	19.57	43.33	<b>62.90</b>	26.97	
	Vendor L	10.00%	19.57	49.83	<b>69.40</b>	20.47	
	Vendor Q	3.00%	5.87	41.05	<b>46.92</b>	42.95	
<b>Acme BE</b>	Vendor BBB	28.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor H	25.00%	40.18	45.17	<b>85.35</b>	7.98	To Negotiation
	Vendor GG	25.00%	40.18	34.67	<b>74.85</b>	18.48	
<b>Acme BF</b>	Vendor BBB	35.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor SS	25.00%	32.14	49.50	<b>81.64</b>	11.69	
<b>Acme BG</b>	Vendor BBB	34.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor H	30.00%	39.71	45.17	<b>84.88</b>	8.45	To Negotiation
	Vendor SS	25.00%	33.09	49.50	<b>82.59</b>	10.74	
<b>Acme BH</b>	Vendor Q	47.00%	45.00	41.05	<b>86.05</b>		To Negotiation

**DIR-TSO-TMP-XXX**  
**Name of Solicitation**

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor X	15.14%	14.50	47.83	<b>62.33</b>	23.72	
	Vendor KK	25.00%	23.94	37.33	<b>61.27</b>	24.78	
<b>Acme BI</b>	Vendor BBB	25.00%	43.27	48.33	<b>91.60</b>		To Negotiation
	Vendor SS	22.50%	38.94	49.50	<b>88.44</b>	3.16	To Negotiation
	Vendor D	26.00%	45.00	43.68	<b>88.68</b>	2.92	To Negotiation
	Vendor JJ	21.00%	36.35	49.00	<b>85.35</b>	6.25	To Negotiation
	Vendor JJJ	20.00%	34.62	48.33	<b>82.95</b>	8.65	To Negotiation
	Vendor Q	21.00%	36.35	41.05	<b>77.40</b>	14.20	
<b>Acme BJ</b>	Vendor BBB	23.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor Q	17.00%	33.26	41.05	<b>74.31</b>	19.02	
	Vendor JJ	7.00%	13.70	49.00	<b>62.70</b>	30.63	
	Vendor D	10.00%	19.57	43.68	<b>63.25</b>	30.08	
	Vendor YY	3.00%	5.87	46.50	<b>52.37</b>	40.96	
<b>Acme BK</b>	Vendor XX	24.00%	45.00	43.67	<b>88.67</b>		To Negotiation
	Vendor YY	10.00%	18.75	46.50	<b>65.25</b>	23.42	
<b>Acme BL</b>	Vendor JJ	18.00%	45.00	49.00	<b>94.00</b>		To Negotiation
	Vendor D	17.00%	42.50	43.68	<b>86.18</b>	7.82	To Negotiation
	Vendor NN	15.89%	39.73	37.00	<b>76.73</b>	17.28	
	Vendor X	5.50%	13.75	47.83	<b>61.58</b>	32.42	
	Vendor Q	3.00%	7.50	41.05	<b>48.55</b>	45.45	
<b>Acme BM</b>	Vendor H	20.00%	45.00	45.17	<b>90.17</b>		To Negotiation
	Vendor BBB	16.00%	36.00	48.33	<b>84.33</b>	5.84	To Negotiation
<b>Acme BN</b>	Vendor BBB	42.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor PP	38.00%	40.71	38.67	<b>79.38</b>	13.95	
	Vendor Q	32.00%	34.29	41.05	<b>75.34</b>	17.99	
	Vendor JJJ	20.00%	21.43	48.33	<b>69.76</b>	23.57	
<b>Acme BO</b>	Vendor D	28.00%	42.00	43.68	<b>85.68</b>		To Negotiation
	Vendor S	23.00%	34.50	50.83	<b>85.33</b>	0.35	To Negotiation

DIR-TSO-TMP-XXX  
Name of Solicitation

Pricing Scoring & Evaluation Summary - Dual Brands							
BRAND	Vendor	Average Proposed Discount	Pricing Score (45 max)	Subtotal Score (Reference, Exceptions, Appendices)	Total Score	Delta	ReAcme Xation
	Vendor PP	30.00%	45.00	38.67	<b>83.67</b>	2.01	To Negotiation
	Vendor JJ	22.50%	33.75	49.00	<b>82.75</b>	2.93	To Negotiation
	Vendor R	18.00%	27.00	50.00	<b>77.00</b>	8.68	To Negotiation
	Vendor XX	22.00%	33.00	43.67	<b>76.67</b>	9.01	To Negotiation
	Vendor YY	18.00%	27.00	46.50	<b>73.50</b>	12.18	
	Vendor SS	10.00%	15.00	49.50	<b>64.50</b>	21.18	
	Vendor CC	10.00%	15.00	48.67	<b>63.67</b>	22.01	
	Vendor Q	12.00%	18.00	41.05	<b>59.05</b>	26.63	
<b>Acme BP</b>	Vendor V	23.00%	45.00	47.50	<b>92.50</b>		To Negotiation
	Vendor H	20.00%	39.13	45.17	<b>84.30</b>	8.20	To Negotiation
	Vendor U	15.00%	29.35	49.83	<b>79.18</b>	13.32	
	Vendor BBB	15.00%	29.35	48.33	<b>77.68</b>	14.82	
	Vendor SS	5.00%	9.78	49.50	<b>59.28</b>	33.22	
<b>Acme BQ</b>	Vendor BBB	12.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor F	11.25%	42.19	43.33	<b>85.52</b>	7.81	To Negotiation
	Vendor HH	10.00%	37.50	44.33	<b>81.83</b>	11.50	
<b>Acme BR</b>	Vendor BBB	28.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor Q	26.00%	41.79	41.05	<b>82.84</b>	10.49	
<b>Acme BS</b>	Vendor W	28.00%	45.00	44.50	<b>89.50</b>		To Negotiation
	Vendor EEE	27.00%	43.39	37.83	<b>81.22</b>	8.28	To Negotiation
<b>Acme BT</b>	Vendor V	30.00%	45.00	47.50	<b>92.50</b>		To Negotiation
	Vendor I	30.00%	45.00	44.00	<b>89.00</b>	3.50	To Negotiation
<b>Acme BU</b>	Vendor JJ	15.00%	45.00	49.00	<b>94.00</b>		To Negotiation
	Vendor BBB	15.00%	45.00	48.33	<b>93.33</b>	0.67	To Negotiation
	Vendor HHH	15.00%	45.00	48.67	<b>93.67</b>	0.33	To Negotiation
	Vendor D	15.00%	45.00	43.68	<b>88.68</b>	5.32	To Negotiation
	Vendor P	15.00%	45.00	42.00	<b>87.00</b>	7.00	To Negotiation
	Vendor U	12.00%	36.00	49.83	<b>85.83</b>	8.17	To Negotiation
	Vendor YY	13.00%	39.00	46.50	<b>85.50</b>	8.50	To Negotiation

**DIR-TSO-TMP-XXX**  
Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor Q	10.00%	30.00	41.05	<b>71.05</b>	22.95	
<b>Acme BV</b>	Vendor R	43.00%	45.00	50.00	<b>95.00</b>		To Negotiation
	Vendor U	37.00%	38.72	49.83	<b>88.55</b>	6.45	To Negotiation
	Vendor L	31.00%	32.44	49.83	<b>82.27</b>	12.73	
	Vendor BBB	32.00%	33.49	48.33	<b>81.82</b>	13.18	
	Vendor YY	30.00%	31.40	46.50	<b>77.90</b>	17.10	
	Vendor NNN	22.00%	23.02	49.50	<b>72.52</b>	22.48	
	Vendor KK	30.00%	31.40	37.33	<b>68.73</b>	26.27	
<b>Acme BW</b>	Vendor JJJ	20.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor Q	2.00%	4.50	41.05	<b>45.55</b>	47.78	
<b>Acme BX</b>	Vendor L	21.00%	45.00	49.83	<b>94.83</b>		To Negotiation
	Vendor H	20.00%	42.86	45.17	<b>88.03</b>	6.80	To Negotiation
	Vendor UU	15.00%	32.14	48.83	<b>80.97</b>	13.86	
	Vendor D	10.00%	21.43	43.68	<b>65.11</b>	29.72	
<b>Acme BY</b>	Vendor KK	45.00%	45.00	37.33	<b>82.33</b>		To Negotiation
	Vendor P	40.00%	40.00	42.00	<b>82.00</b>	0.33	To Negotiation
	Vendor W	34.00%	34.00	44.50	<b>78.50</b>	3.83	To Negotiation
	Vendor YY	30.00%	30.00	46.50	<b>76.50</b>	5.83	To Negotiation
	Vendor H	30.00%	30.00	45.17	<b>75.17</b>	7.16	To Negotiation
	Vendor NN	35.09%	35.09	37.00	<b>72.09</b>	10.24	To Negotiation
	Vendor Q	30.00%	30.00	41.05	<b>71.05</b>	11.28	To Negotiation
	Vendor SS	15.00%	15.00	49.50	<b>64.50</b>	17.83	
<b>Acme BZ</b>	Vendor Q	19.00%	45.00	41.05	<b>86.05</b>		To Negotiation
	Vendor EE	10.00%	23.68	39.33	<b>63.01</b>	23.04	
<b>Acme CA</b>	Vendor XX	30.00%	45.00	43.67	<b>88.67</b>		To Negotiation
	Vendor SS	17.50%	26.25	49.50	<b>75.75</b>	12.92	
<b>Acme CB</b>	Vendor JJ	18.50%	45.00	49.00	<b>94.00</b>		To Negotiation
	Vendor D	10.00%	24.32	43.68	<b>68.00</b>	26.00	

**DIR-TSO-TMP-XXX**  
**Name of Solicitation**

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor Q	7.00%	17.03	41.05	<b>58.08</b>	35.92	
<b>Acme CC</b>	Vendor HHH	10.00%	45.00	48.67	<b>93.67</b>		To Negotiation
	Vendor BBB	10.00%	45.00	48.33	<b>93.33</b>	0.34	To Negotiation
<b>Acme CD</b>	Vendor R	47.00%	45.00	50.00	<b>95.00</b>		To Negotiation
	Vendor CCC	37.50%	35.90	50.50	<b>86.40</b>	8.60	To Negotiation
	Vendor GGG	44.30%	42.41	40.00	<b>82.41</b>	12.59	
	Vendor Q	33.00%	31.60	41.05	<b>72.65</b>	22.35	
<b>Acme CE</b>	Vendor S	40.00%	45.00	50.83	<b>95.83</b>		To Negotiation
	Vendor UU	40.00%	45.00	48.83	<b>93.83</b>	2.00	To Negotiation
	Vendor JJ	39.00%	43.88	49.00	<b>92.88</b>	2.96	To Negotiation
	Vendor R	34.00%	38.25	50.00	<b>88.25</b>	7.58	To Negotiation
	Vendor Q	39.00%	43.88	41.05	<b>84.93</b>	10.91	
<b>Acme CF</b>	Vendor L	30.00%	45.00	49.83	<b>94.83</b>		To Negotiation
	Vendor YY	30.00%	45.00	46.50	<b>91.50</b>	3.33	To Negotiation
	Vendor R	26.00%	39.00	50.00	<b>89.00</b>	5.83	To Negotiation
	Vendor BBB	25.00%	37.50	48.33	<b>85.83</b>	9.00	To Negotiation
	Vendor JJJ	20.00%	30.00	48.33	<b>78.33</b>	16.50	
	Vendor SS	18.50%	27.75	49.50	<b>77.25</b>	17.58	
	Vendor GGG	22.00%	33.00	40.00	<b>73.00</b>	21.83	
	Vendor NN	22.74%	34.11	37.00	<b>71.11</b>	23.72	
	Vendor U	13.00%	19.50	49.83	<b>69.33</b>	25.50	
	Vendor KK	19.00%	28.50	37.33	<b>65.83</b>	29.00	
	Vendor X	8.00%	12.00	47.83	<b>59.83</b>	35.00	
	Vendor Q	12.00%	18.00	41.05	<b>59.05</b>	35.78	
	Vendor LL	10.00%	15.00	35.67	<b>50.67</b>	44.16	
	Vendor EEE	2.00%	3.00	37.83	<b>40.83</b>	54.00	
<b>Acme CG</b>	Vendor U	47.00%	45.00	49.83	<b>94.83</b>		To Negotiation
	Vendor BBB	43.00%	41.17	48.33	<b>89.50</b>	5.33	To Negotiation
	Vendor SS	42.50%	40.69	49.50	<b>90.19</b>	4.64	To Negotiation
	Vendor L	42.00%	40.21	49.83	<b>90.04</b>	4.79	To Negotiation

**DIR-TSO-TMP-XXX**  
Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor UU	42.00%	40.21	48.83	<b>89.04</b>	5.79	To Negotiation
	Vendor JJ	40.00%	38.30	49.00	<b>87.30</b>	7.53	To Negotiation
	Vendor D	42.00%	40.21	43.68	<b>83.89</b>	10.94	
	Vendor OO	37.00%	35.43	44.50	<b>79.93</b>	14.90	
	Vendor Q	40.00%	38.30	41.05	<b>79.35</b>	15.48	
	Vendor NN	43.92%	42.05	37.00	<b>79.05</b>	15.78	
<b>Acme CH</b>	Vendor W	64.00%	45.00	44.50	<b>89.50</b>		To Negotiation
	Vendor P	40.00%	28.13	42.00	<b>70.13</b>	19.38	
	Vendor KK	39.00%	27.42	37.33	<b>64.75</b>	24.75	
<b>Acme CI</b>	Vendor D	30.00%	45.00	43.68	<b>88.68</b>		To Negotiation
	Vendor JJJ	20.00%	30.00	48.33	<b>78.33</b>	10.35	
	Vendor Q	21.00%	31.50	41.05	<b>72.55</b>	16.13	
	Vendor L	10.00%	15.00	49.83	<b>64.83</b>	23.85	
	Vendor BBB	5.00%	7.50	48.33	<b>55.83</b>	32.85	
<b>Acme CJ</b>	Vendor H	25.00%	45.00	45.17	<b>90.17</b>		To Negotiation
	Vendor SS	22.50%	40.50	49.50	<b>90.00</b>	0.17	To Negotiation
<b>Acme CK</b>	Vendor H	8.25%	45.00	44.50	<b>89.50</b>		To Negotiation
	Vendor EE	5.00%	27.27	39.33	<b>66.60</b>	22.90	
<b>Acme CL</b>	Vendor Q	31.00%	45.00	41.05	<b>86.05</b>		To Negotiation
	Vendor O	30.00%	43.55	34.50	<b>78.05</b>	8.00	To Negotiation
<b>Acme CM</b>	Vendor YY	30.00%	45.00	46.50	<b>91.50</b>		To Negotiation
	Vendor SS	17.50%	16.41	49.50	<b>65.91</b>	25.59	
	Vendor Q	18.00%	16.88	41.05	<b>57.93</b>	33.58	
<b>Acme CN</b>	Vendor S	38.00%	42.75	50.83	<b>93.58</b>		To Negotiation
	Vendor BBB	40.00%	45.00	48.33	<b>93.33</b>	0.25	To Negotiation
	Vendor JJ	38.50%	43.31	49.00	<b>92.31</b>	1.27	To Negotiation
	Vendor U	35.00%	39.38	49.83	<b>89.21</b>	4.38	To Negotiation
	Vendor D	37.00%	41.63	43.68	<b>85.31</b>	8.27	To Negotiation

**DIR-TSO-TMP-XXX**  
**Name of Solicitation**

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor SS	29.00%	32.63	49.50	<b>82.13</b>	11.46	
	Vendor YY	30.00%	33.75	46.50	<b>80.25</b>	13.33	
	Vendor Q	32.00%	36.00	41.05	<b>77.05</b>	16.53	
	Vendor P	20.00%	22.50	42.00	<b>64.50</b>	29.08	
<b>Acme CO</b>	Vendor BBB	48.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor H	35.00%	32.81	45.17	<b>77.98</b>	15.35	
<b>Acme CP</b>	Vendor U	32.00%	45.00	49.83	<b>94.83</b>		To Negotiation
	Vendor R	29.00%	40.78	50.00	<b>90.78</b>	4.05	To Negotiation
	Vendor D	25.00%	35.16	43.68	<b>78.84</b>	15.99	
	Vendor YY	20.00%	28.13	46.50	<b>74.63</b>	20.21	
	Vendor NN	15.22%	21.40	37.00	<b>58.40</b>	36.43	
	Vendor Q	5.00%	7.03	41.05	<b>48.08</b>	46.75	
<b>Acme CQ</b>	Vendor H	25.00%	45.00	45.17	<b>90.17</b>		To Negotiation
	Vendor Q	5.00%	9.00	41.05	<b>50.05</b>	40.12	
<b>Acme CR</b>	Vendor Y	10.00%	45.00	48.50	<b>93.50</b>		To Negotiation
	Vendor SS	0.75%	3.38	49.50	<b>52.88</b>	40.63	
<b>Acme CS</b>	Vendor HHH	10.00%	45.00	48.67	<b>93.67</b>		To Negotiation
	Vendor H	10.00%	45.00	44.50	<b>89.50</b>	4.17	To Negotiation
<b>Acme CT</b>	Vendor BBB	38.00%	45.00	48.33	<b>93.33</b>		To Negotiation
	Vendor I	37.75%	44.70	44.00	<b>88.70</b>	4.63	To Negotiation
	Vendor H	35.00%	41.45	45.17	<b>86.62</b>	6.71	To Negotiation
	Vendor JJ	20.00%	23.68	49.00	<b>72.68</b>	20.65	
<b>Acme CU</b>	Vendor Q	46.00%	45.00	41.05	<b>86.05</b>		To Negotiation
	Vendor BBB	30.00%	29.35	48.33	<b>77.68</b>	8.37	To Negotiation
	Vendor KK	25.00%	24.46	37.33	<b>61.79</b>	24.26	
<b>Acme CV</b>	Vendor JJ	17.50%	45.00	49.00	<b>94.00</b>		To Negotiation
	Vendor H	15.00%	38.57	45.17	<b>83.74</b>	10.26	To Negotiation

**DIR-TSO-TMP-XXX**  
Name of Solicitation

<b>Pricing Scoring &amp; Evaluation Summary - Dual Brands</b>							
<b>BRAND</b>	<b>Vendor</b>	<b>Average Proposed Discount</b>	<b>Pricing Score (45 max)</b>	<b>Subtotal Score (Reference, Exceptions, Appendices)</b>	<b>Total Score</b>	<b>Delta</b>	<b>ReAcme Xation</b>
	Vendor SS	10.00%	25.71	49.50	<b>75.21</b>	18.79	To Negotiation
<b>Acme CW</b>	Vendor XX	25.00%	45.00	43.67	<b>88.67</b>		To Negotiation
	Vendor KK	25.00%	45.00	37.33	<b>82.33</b>	6.34	To Negotiation
	Vendor Q	14.00%	25.20	41.05	<b>66.25</b>	22.42	
<b>Acme CX</b>	Vendor R	36.00%	45.00	50.00	<b>95.00</b>		To Negotiation
	Vendor U	30.00%	37.50	49.83	<b>87.33</b>	7.67	To Negotiation
	Vendor L	29.00%	36.25	49.83	<b>86.08</b>	8.92	To Negotiation
	Vendor BBB	30.00%	37.50	48.33	<b>85.83</b>	9.17	To Negotiation
	Vendor SS	27.20%	34.00	49.50	<b>83.50</b>	11.50	
	Vendor JJ	27.00%	33.75	49.00	<b>82.75</b>	12.25	
	Vendor LLL	26.45%	33.06	48.67	<b>81.73</b>	13.27	
	Vendor W	26.50%	33.13	44.50	<b>77.63</b>	17.38	
	Vendor D	20.00%	25.00	43.68	<b>68.68</b>	26.32	
	Vendor Q	22.00%	27.50	41.05	<b>68.55</b>	26.45	
<b>Acme CY</b>	Vendor SS	10.00%	45.00	49.50	<b>94.50</b>		To Negotiation
	Vendor JJ	2.50%	11.25	49.00	<b>60.25</b>	34.25	
<b>Acme CZ</b>	Vendor S	31.00%	45.00	50.83	<b>95.83</b>		To Negotiation
	Vendor KK	28.00%	40.65	37.33	<b>77.98</b>	17.85	
<b>Acme DA</b>	Vendor V	35.00%	42.57	47.50	<b>90.07</b>		To Negotiation
	Vendor I	37.00%	45.00	44.00	<b>89.00</b>	1.07	To Negotiation
	Vendor S	27.00%	32.84	50.83	<b>83.67</b>	6.40	To Negotiation
	Vendor BBB	28.00%	34.05	48.33	<b>82.38</b>	7.69	To Negotiation
	Vendor RR	15.00%	18.24	46.50	<b>64.74</b>	25.33	
<b>Acme DB</b>	Vendor SS	30.00%	43.55	49.50	<b>93.05</b>		To Negotiation
	Vendor Q	31.00%	45.00	41.05	<b>86.05</b>	7.00	To Negotiation
	Vendor JJ	20.50%	29.76	49.00	<b>78.76</b>	14.29	
<b>Acme DC</b>	Vendor BBB	18.00%	45.00	48.33	<b>93.33</b>		To Negotiation

DIR-TSO-TMP-XXX  
Name of Solicitation

Pricing Scoring & Evaluation Summary - Dual Brands							
BRAND	Vendor	Average Proposed Discount	Pricing Score (45 max)	Subtotal Score (Reference, Exceptions, Appendices)	Total Score	Delta	ReAcme Xation
	Vendor YY	10.29%	25.73	46.50	<b>72.23</b>	21.11	
	Vendor Q	3.00%	7.50	41.05	<b>48.55</b>	44.78	



**Texas Department of Information Resources**

**eProcurement Application Development Project**

DIR-SDD-2081

August 17, 2016

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Jimmy Schatte  
2500 Bee Cave Rd  
Building Two, Suite 220  
Austin, TX 78746

August 17, 2016

Dear Evaluation Committee:

We are pleased to respond to the Deliverables-Based Information Technology Services (DBITS) Statement of Work (SOW) for an eProcurement Application Development Project and to have the opportunity to present our proposed solution, approach and qualifications to serve the Texas Department of Information Resources (DIR) as an application development solution provider on the initiative. Thank you for your time as you review our proposal.

We have provided supporting material to convey the qualities that make Sense Corp a highly attractive candidate to perform these application development and delivery services for DIR:

- Sense Corp has delivered several *award-winning* web and mobile applications across a variety of technology platforms, development frameworks, and programming languages, and our proposed team has successfully delivered several critical applications for large state agencies in Texas including the Health and Human Services Commission (HHSC), Department of Transportation (TxDOT), and DIR.
- Our proven, locally based team brings deep experience in traditional development techniques combined with a strong understanding of emerging technologies that will enable DIR success in a short timeframe.
- To complement our expertise, Sense Corp is partnering with Ventas Consulting, a highly regarded Texas Historically Underutilized Business (HUB) with extensive experience in the Salesforce.com technologies that form the cornerstone of our proposed solution.
- Being a Texas Corporation, with a majority of our consultants living and working in Texas, we understand the need for quality providers to assist in the many challenges that exist today and in the future. As fellow Texans, we hold ourselves to a very high standard in the work we perform for the State of Texas.

We believe that our experience and delivery capabilities will put us in an excellent position to enable positive change for DIR with this and other initiatives. Don't just take our word for it! We encourage you to reach out to our previous clients and other state agencies in Texas. We are confident they will confirm the unrivaled level of service we deliver to each and every client.

Best regards,



Jimmy Schatte

Partner, Managing Director – Public Sector

## WHY TEAM SENSE CORP?

With over two decades of experience delivering large scale solutions across a variety of industries including healthcare, human services, energy, telecommunications, financial services and public sector clients including state, local and education markets, Team Sense Corp provides DIR with an unmatched level of expertise that most firms can't touch. Team Sense Corp understands the critical nature of the Texas Department of Information Resources (DIR) eProcurement Project to the State of Texas and the importance of a modernized procurement system to all DIR stakeholders. We possess a unique combination of skills that make Team Sense Corp the most qualified firm to partner with DIR on the eProcurement effort:

**Extensive knowledge of and expertise with existing DIR applications and technology platforms** - Our first-hand knowledge of current DIR applications that will need to interface with the eProcurement system combined with our deep expertise in the SharePoint and Salesforce platforms ensures we will be able to successfully move the eProcurement project forward quickly without impacting the functionality of DIR's current systems during the development cycle. Specific expertise includes:

- In 2014, Sense Corp designed, developed and delivered the re-launch of the DIR MarketPlace (dir.texas.gov). A major component of the DIR website was delivered through the SharePoint 2013 platform, and the scope of the project include configuration of several SharePoint components which provide the primary services and functions for the DIR website. We also integrated three major elements of the website, including the Salesforce application used to manage contract and vendor information.
- Our partner, Ventas Consulting (Ventas), is a highly regarded Texas based Salesforce systems integrator with extensive business and technical knowledge of Salesforce solutions. Ventas is a Texas Historically Underutilized Business (HUB) with over 100 completed Salesforce implementations, including work at multiple Texas state agencies.
- In 2011, Sense Corp provided DIR strategic advisory services during the CAPPs Implementation to ensure a successful transition to the new ERP system. Sense Corp assessed the readiness of the Finance organization to adopt business process change and a new ERP system, lead the definition of the appropriate chart of accounts structure and defined the information delivery architecture to ensure DIR had accessibility to data capture in the CAPPs system to support their reporting needs.

**Proven Methodologies and Delivery Approach** - Team Sense Corp provides the expertise required to plan, manage, execute and deliver an eProcurement solution in a manner that results in low risk and high quality to DIR. Team Sense Corp brings an iterative, results driven delivery approach based on sound methodologies that bring rigor to the process while at the same time providing the flexibility to understand each unique situation. Our project management approach and methodology leverages the Project Management Body of Knowledge (PMBOK) and other project management best practices. In addition, our comprehensive requirements based testing methodology emphasizes the integrity of the solution from an accuracy, performance and experience perspective. Our methodologies are detailed in the Project Management Plan section of this response.

**Procurement and Contract Management Expertise** - Team Sense Corp has a deep understanding of the business requirements associated with public sector/State of Texas procurement and contract management functions. Our experience spans the entire procurement lifecycle, including assessments and recommendations for improvement of current-state people, process and technology factors that support state agency procurement activities. For example, as a component of our work on the Enterprise Content Management (ECM) project at the Texas Comptroller of Public Accounts, Sense Corp supported the procurement process for the selection of the ECM vendor through assisting with various aspects of the RFP process.

In addition, our partner, Ventas Consulting (Ventas) has extensive experience developing Salesforce applications which automate the procurement lifecycle for State agencies and other public sector clients. For example, Ventas developed and implemented a Procurement Management System for the City of Dallas Information Technology Department which included a procurement request site, a vendor authorization system and an integrated approval process. Phase II of this project (in progress) includes a Solicitation Management System. Ventas also developed and implemented a Contract and Compliance Management system for the Texas Permanent School Fund division of the Texas Education Agency, which automated workflows and approvals associated with the entire State of Texas procurement/contract management lifecycle (including procurement from DIR contract vehicles).

**Highly Qualified Team** - Team Sense Corp will be staffed with resources who have firsthand experience with DIR's existing applications (dir.texas.gov and Salesforce), external state systems (CAPPS, ESD and CMBL), and business processes as well as resources with deep expertise in the technologies included in our proposed solution. Our team will leverage this knowledge when planning, designing and implementing our proposed eProcurement solution. Our ability to successfully execute integrations between existing applications/external systems and our proposed eProcurement application will provide DIR with a seamless solution.

## PREVIOUS EXPERIENCE

Team Sense Corp has a proven track record of delivering services similar to those requested by DIR for the eProcurement Project. The table below highlight's Team Sense Corp's qualifications, experiences and expertise required to provide DIR with an eProcurement system which meets all of your requirements. Additional details on each of these projects and references are available if needed.

Organization	Services Provided	Duration	Highlights
<b>Texas Department of Information Resources (DIR)</b>	Multiple projects including: <ul style="list-style-type: none"> <li>• CAPPs ERP Implementation</li> <li>• Marketplace (dir.texas.gov) implementation</li> </ul>	4 years	Designed, developed and implemented DIR Marketplace on the SharePoint Platform; included development of interface with Salesforce application.
<b>Texas Department of Transportation (TxDOT)</b>	Multiple projects including: <ul style="list-style-type: none"> <li>• ePMO Organizational Change Management</li> <li>• Project Management Training</li> <li>• ePMO Crossroads Portal Implementation</li> <li>• EIM Assessment and Program Oversight</li> </ul>	4 years	Re-designed, developed and implemented the Enterprise Project Management Office's Crossroads site leveraging the Microsoft SharePoint platform. The site provided project management assistance to all of TxDOT's Districts, Divisions and Offices.
<b>Texas Comptroller of Public Accounts (CPA)</b>	Multiple projects including: <ul style="list-style-type: none"> <li>• ECM Assessment</li> <li>• ECM IV&amp;V</li> <li>• Information Management Strategy and BI Assessment Services</li> </ul>	4 years	Scope included: <ul style="list-style-type: none"> <li>• Current state assessment, future state definition, gap analysis, solution analysis and road mapping</li> <li>• Procurement and solicitation assistance including requirements definition, RFP development</li> </ul>
<b>Texas Health and Human Services Commission (HHSC)</b>	Multiple projects including:	3 years	

Organization	Services Provided	Duration	Highlights
	<ul style="list-style-type: none"> <li>Implementation of Enterprise Data Governance (EDG) program</li> <li>Implementation of Enterprise Master Data Management (MDM) program</li> <li>Establishment of Chief Data Office</li> </ul>		
<b>Texas Education Agency (TEA)</b>	<ul style="list-style-type: none"> <li>Provided IV&amp;V services on Texas Student Data System (TSDS) implementation</li> </ul>	9 months	Ensured the integrity of the implementation of critical State system.
<b>Texas Department of Public Safety (TXDPS)</b>	<ul style="list-style-type: none"> <li>Facilitated the analysis of key business cases for the enhancement of the Incident Management System</li> </ul>	6 months	
<b>Electric Reliability Council of Texas (ERCOT) / Public Utility Commission of Texas (PUC)</b>	Multiple project including: <ul style="list-style-type: none"> <li>BI Strategy Assessment</li> <li>Near Real-Time Analytics</li> <li>Reporting and Enterprise Data Warehouse Implementation</li> </ul>	3 years	Designed, developed and implemented one of the largest near real-time data warehouses in Texas (stable and “keeping the lights on” for 8+ years).
<b>Michael &amp; Susan Dell Foundation / EdFi Alliance</b>	Multiple projects including: <ul style="list-style-type: none"> <li>EdFi Alliance Dashboards Implementation</li> <li>BI Best Practices</li> </ul>	2 years	Designed, developed and implemented an education analytics solution being rolled out to 14+ state education agencies.
<b>University of Texas at Austin</b>	<ul style="list-style-type: none"> <li>Led architecture and design of critical web hosting legacy modernization program</li> </ul>	1.5 years	

Organization	Services Provided	Duration	Highlights
<b>Department of Aging and Disability Services (DADS) - Ventas</b>	<ul style="list-style-type: none"> <li>Legacy application modernization to the Salesforce.com platform</li> </ul>	Ongoing	Developed new tracking and reporting applications and migrated data to Salesforce.
<b>City of Dallas - Ventas</b>	<ul style="list-style-type: none"> <li>Implementation of a Procurement Management Application built on the Force.com Platform</li> </ul>	Ongoing	<ul style="list-style-type: none"> <li>Phase 1 - Designed, developed and implemented a procurement request site, a vendor authorization system and an integrated approval system.</li> <li>Phase 2 – Developing and implementing a Solicitation Management System.</li> </ul>
<b>Texas Permanent School Fund - Texas Education Agency (TEA) - Ventas</b>	<ul style="list-style-type: none"> <li>Implementation of Contract and Compliance Management System in Salesforce.com</li> </ul>	10 months (nearing completion)	<ul style="list-style-type: none"> <li>Automated workflows and approvals associated with the entire State of Texas procurement/contract management lifecycle.</li> </ul>

## COMPANY BACKGROUND

### SENSE CORP

Sense Corp was founded in 1996 as a new breed management consulting firm focused on business strategy, organizational structure, process design, and technology delivery. We span the entire transformation process with deep experience in system integration and technology implementation to enable the adoption, extendibility, and sustainability of organizational transformation. Since our inception, we have defined customer satisfaction as the prime measure of success. Sense Corp is a Texas corporation with primary offices in Austin, Dallas, Houston and St. Louis. We are 100% employee-owned and operate free from outside investor influences.

**FRESH IDEAS THAT ACTUALLY WORK**

 <b>VOTED BEST PLACE TO WORK</b> <small>2008 – 2016 All Cities</small>	 <b>Inc. 500</b> <small>5 Years Straight</small>	<b>100% EMPLOYEE OWNED</b>	 <b>CULTURE</b> <small>Quality Accountability Aligned Motives Balanced Approach</small> <small>Brilliant   Creative   Human   Fun</small>
<b>SENSE CORP OUTREACH</b> <small>Capacity building for non-profits Over \$2M in pro-bono services</small>	<b>EMPLOYEE RETENTION</b> <small>significantly above INDUSTRY AVERAGE</small>	<b>BPTW CFO of the Year</b> <b>BPTW COO of the Year</b> <b>EY Entrepreneur Of The Year Finalist (CEO)</b>	
<small>2013 Computerworld Honors Laureate Award OutSystems Global Innovation Award</small> <div style="border: 1px solid #003366; padding: 5px; width: fit-content; margin: 0 auto;"> <small>Our Commitment to Our Local Community</small> </div>	<b>20 YEARS OF EXCELLENCE</b> <small>Founded in 1996</small>	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <b>AUSTIN</b> HOUSTON DALLAS ST. LOUIS                 </div> </div>	

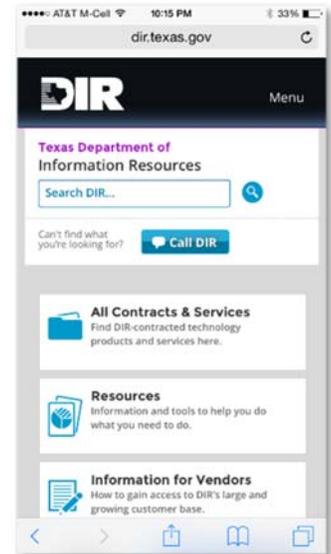
**Our Primary Measure Of Success Is Client Satisfaction**

### Deep Government Experience:

Sense Corp offers resources with a **fundamental understanding of the functional, technical, and regulatory requirements throughout government agencies**. This expertise comes from successful engagements working with several state agencies including: Texas Department of Information Resources (DIR), Texas Comptroller of Public Accounts (CPA), Texas Health and Human Services Commission (HHSC), Texas Education Agency (TEA), Employees Retirement System of Texas (ERS), Texas Department of Transportation (TxDOT), and Electric Reliability Council of Texas (ERCOT), to name a few. By leveraging best practices, while taking each project and organization's unique requirements into account, we will work together to offer solutions that meet your business needs.

### Web and Mobile Application Delivery Expertise:

Sense Corp has delivered **several award-winning web and mobile applications** across a variety of technology platforms, development frameworks, and programming languages. We are partnered with leading mobile delivery and low-code development platform providers and stay current with emerging web/mobile technology. Our applications have won global innovation awards and garnered recognition from Computerworld. Recently, we were the consulting partner that designed and re-launched [dir.texas.gov](http://dir.texas.gov) with a new responsive design (for desktop, tablet, and mobile) on a more scalable and maintainable platform. These and other project experiences should give you the confidence that our proposed solution is backed by deep implementation experience.



### Full Spectrum of IT Services:

For two decades, Sense Corp has provided a full spectrum of IT services including: IT strategy, data and technical architecture, enterprise systems implementation (ERP, CRM, etc.), system and application integration (SOA, ESB, and EAI), application development and maintenance, information management (BI, DW, EPM, Big Data and MDM), enterprise content management (ECM) and business process management (BPM).

### Technology Agnostic View:

Sense Corp has deep skills and knowledge across all relevant technologies. We have a **technology agnostic approach**. This means that when advising clients on incremental hardware or software needs clients can count on us to provide them with a truly independent perspective. In addition, we maintain an extensive list of partnerships with leading technology firms as well as other service providers to ensure that we can quickly identify and bring to bear the appropriate technical expertise required for successful projects.

## VENTAS CONSULTING

To complement our expertise, Sense Corp is partnering with Ventas Consulting (Ventas), a highly regarded Texas-based company with extensive business knowledge around Salesforce solutions, including the Sales Cloud, Services Cloud, Custom and Platform Development and Salesforce App Exchange development. Sense Corp will leverage Ventas' exceptional Salesforce expertise to provide analysis, development and integration services for the DIR eProcurement application.

Ventas is a Salesforce professional technology services firm operating in Austin, Dallas, Houston and San Antonio, and is a State of Texas Historically Underutilized Business (HUB). As a Salesforce Silver Cloud Alliance Partner, Ventas focuses on creating practical business strategies that maximize Salesforce investments and ensure that the environment adapts to the changing business requirements.

Ventas offers professional services consisting of Customer Relationship Management (CRM) Implementation, Custom Application Development, Business Strategy and Data Integration & Migration. With years of experience deploying Salesforce solutions, Ventas considers known success drivers to ensure successful implementations and maximum ROI.

Ventas' Texas public sector customers include the Texas Department of Aging and Disability Services, the Texas Permanent School Fund – Texas Education Agency and the City of Dallas IT Department. Private sector customers include Alert Logic, Inc. Lennox Industries and Gemalto to name a few.



### How We Measure Up

100 

Salesforce Implementations Completed

20+ 

Salesforce Certifications

9.2/10 

Customer Satisfaction Rate on Salesforce Appexchange

50,000+ 

Consulting Hours

## PROPOSED SOLUTION

### SOLUTION OVERVIEW

Team Sense Corp’s proposed solution is designed to provide DIR with the enhanced functionality and technology needed to support procurement and contracting business processes by providing a robust, information-rich eProcurement application. **By leveraging DIR’s investment in the SharePoint and Salesforce platforms and other technologies, our proposed solution provides the open architecture needs DIR desires in order to simplify future extendibility and maintenance of the system.** Team Sense Corp carefully chose the platform for each of the eProcurement components/deliverables based on the functionality required for each of the components. In addition, our proposed eProcurement solution will seamlessly integrate with existing DIR applications as well as the Comptroller’s Centralized Accounting and Payroll/Personnel (CAPPS) System and other required systems.

In addition to our proposed solution, Team Sense Corp will provide training to DIR personnel to help them acquire the necessary skills and proficiencies for utilizing the eProcurement system and trainer certification program for DIR staff. The training will be provided prior to User Acceptance Testing. Our training includes: Program Administrator Training, Contract Manager Training, and a Certified Training Program which meet the requirements specified in the SOW. Please see the Training Plan within the Project Management Plan for additional details.

Team Sense Corp will execute Project Closeout and Post Implementation Support at the conclusion of the project. During this time, all documentation and deliverables will be transitioned to the appropriate DIR resources. As part of the Post Implementation Support, Team Sense Corp will continue to provide support beyond deployment through a predetermined period of time (to be determined during the contract award process).

### PROPOSED SOLUTION ARCHITECTURE

The following diagram depicts our proposed logical solution architecture for the eProcurement system incorporating DIR’s requested system components and functionality. Our proposed solution leverages DIR’s existing investments in tools and technologies including SharePoint, Salesforce, DocuSign, and reporting toolsets. In addition, our proposed solution will seamlessly integrate with existing user interfaces providing a responsive design to support access from desktop, tablet, and mobile devices. All major system components will leverage DIR’s existing authentication and access control mechanisms.

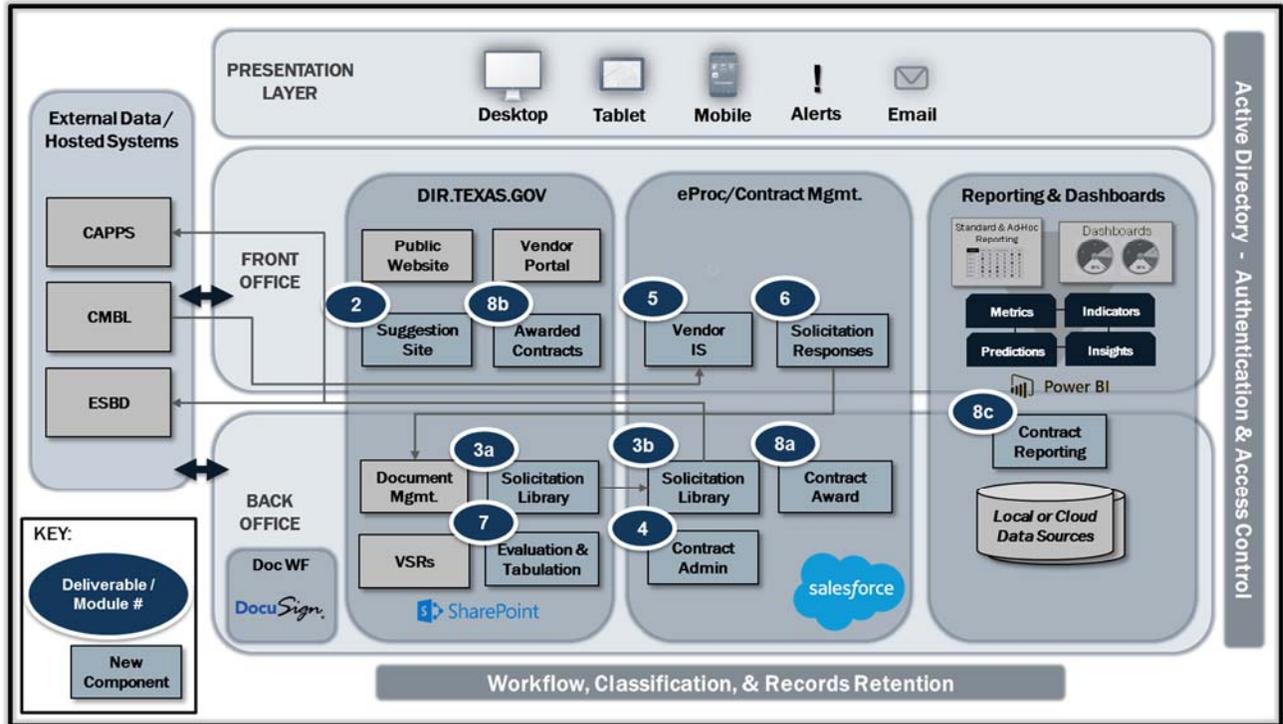


Figure 1 – Logical Solution Architecture

The diagram identifies these logical layers of the solution:

1. **Front Office** – these components of the system are outwardly facing and service external constituents, which includes the existing public website. External constituents include vendors, customers/agencies, citizens, and other external stakeholders.
2. **Back Office** – these components of the system are primarily exposed to DIR staff and internal agency stakeholders facilitating procurement and contract management processes. These components interact with and share data with components in the Front Office layer.
3. **External Data / Hosted Systems** – these are external state systems that the solution interfaces with to retrieve or publish data to facilitate a procurement or contract management function, including: CAPPS, CMBL, and ESBD.

Our proposed solution leverages these existing DIR platforms/environments:

1. **DIR.TEXAS.GOV** – this environment includes everything that exists within the on premise SharePoint platform that leverages either part of the SharePoint development framework or a custom developed .NET/C# component.
2. **eProcurement / Contract Management** – this environment encompasses existing DIR functionality in the Salesforce.com platform in the cloud as well as future state components to be developed based on the FORCE.com framework.

**3. Reporting / Dashboard Environment** – this environment encompasses existing databases and reporting toolsets that facilitate procurement and contract management reporting (and/or other reporting tools DIR currently has licensed).

Team Sense Corp’s proposed solution is designed to meet all of the requirements specified in the DIR eProcurement SOW. Each of the major eProcurement deliverables/components requested in the DIR SOW are numbered in the diagram above with a blue oval, and their placement on the architecture diagram indicates whether they support primarily front office or back office functions as well as the technology platform hosting that functionality. The table below describes the details of our proposed solution for each of the eProcurement components/deliverables.

Component/Deliverable	Platform	Description
<b>2. Suggestion Site</b>	SharePoint	This component will be built within the SharePoint environment and exposed to external constituents on dir.texas.gov. It will leverage a SharePoint List to capture feedback submitted by public user through the existing dir.texas.gov site. The SharePoint List will include item status and appropriate workflow to notify staff on actionable requests.
<b>3. Solicitation Library</b>	SharePoint/ Salesforce	This component will leverage both the SharePoint and Salesforce environments to take advantage of each of the platforms’ strengths with a seamless integration to hand off a compiled bid package.
3a. Solicitation Bid Package Preparation	SharePoint	By leveraging SharePoint out-of-box capabilities in document creation and disparate content management, this component will enable a workflow based, collaborative environment to rapidly iterate on the creation of a solicitation documents. This component will be architected in a way that supports ease of content reuse and content merging. This feature will be based on SharePoint Lists for content storage, Microsoft Word for the merging of content into documents, and workflow to manage the creation and signoff process.
3b. Solicitation Bid Package Publishing	Salesforce	Once the bid package is created and approved, it will be published to appropriate bidders within the Front Office Salesforce application. This will leverage Salesforce records to store the checklists required to verify completeness of the package. If the checklist is completed, the package will be routed for any required additional approvals.

Component/Deliverable	Platform	Description
		Additionally, there will be an integration to the ESBD and CAPPs system.
<b>4. Contract Administration and Usage Tracking</b>	Salesforce	This component will be expanded upon existing contract management functionality DIR has built in Salesforce. Consolidation and integration of existing and new functionality will occur within the Salesforce container including both Front Office and Back Office functionality. A Salesforce application will be created to manage and track these Contracts. A contract search page will be created to allow users to search for contracts by key dates or any other keywords. We will use standard Salesforce reports to create the reports specified in Attachment A.
<b>5. Vendor Information System</b>	Salesforce	This component will be built on the Salesforce platform leveraging Salesforce Communities and will integrate seamlessly with the Solicitation Library, Solicitation Responses, Contract Award, and Contract Administration components within environment. It will also integrate externally with the Certified Master Bidder List (CMBL).
<b>6. Solicitation Responses</b>	Salesforce	The Front Office features that allow vendors to interact with the eProcurement system including the submission of questions and submission of responses will be managed within the Salesforce platform. These components will be built on the Salesforce platform leveraging Salesforce Communities. Vendors with a Community Login will be able to login and see/edit their questions. Additionally, any information that needs to be made available publicly on a website will be displayed using a Salesforce Site Page.
<b>7. Evaluation and Tabulation</b>	SharePoint	After the responses have been received and the deadline has passed, final response documents are available to the evaluation team. This component will allow the custom creation of scorecards from pre-built and/or new criteria, the electronic distribution to the evaluation team, and management of the evaluation process with the capture of all evaluation/tabulation data. This feature will be based on SharePoint Lists, Library, and Survey functionality and may also require custom .NET/C# components.

Component/Deliverable	Platform	Description
<b>8. Contract Award, Auditing and Reporting</b>		
8a. Contract Award	Salesforce	Upon award, notifications are sent to the awarded vendor using the Salesforce platform via their single Front Office user interface and email. Notifications to other bidders can be managed as well. All appropriate contract documents and metadata will be captured in Salesforce for ongoing management of the awarded contract.
8b. Posting of Awarded Contracts	SharePoint	Final awarded bid responses and packages will be captured in the SharePoint Back Office document/records management component. For editing of records and/or the redaction of content, SharePoint will provide the versioning and records management features required in this component. Finalized documents will be published to dir.texas.gov.
8c. Contract Reporting	Existing Reporting Tools	Some standard Back Office operational reporting on procurement and contract metadata will be available within the Salesforce platform. Other standard/ad-hoc reporting, and dashboards will leverage existing databases (SQLServer/Oracle) and existing/licensed reporting tools (i.e., Business Objects and/or Power BI). Given that majority of the data related to dir.texas.gov is currently stored in SQLServer and DIR's exiting investment, Power BI would most likely be the recommended toolset for reporting and dashboarding. We have the skills to develop in any of the existing toolsets and will work with DIR to determine best option.

## DELIVERY APPROACH

Team Sense Corp will deliver the eProcurement system components outlined in the above table through an incremental and iterative process. This means that system components/deliverables are broken into five (2) week Development Cycles (or Sprints). Every 2 weeks a checkpoint is done with users and stakeholders to demo that part of the application and obtain feedback.

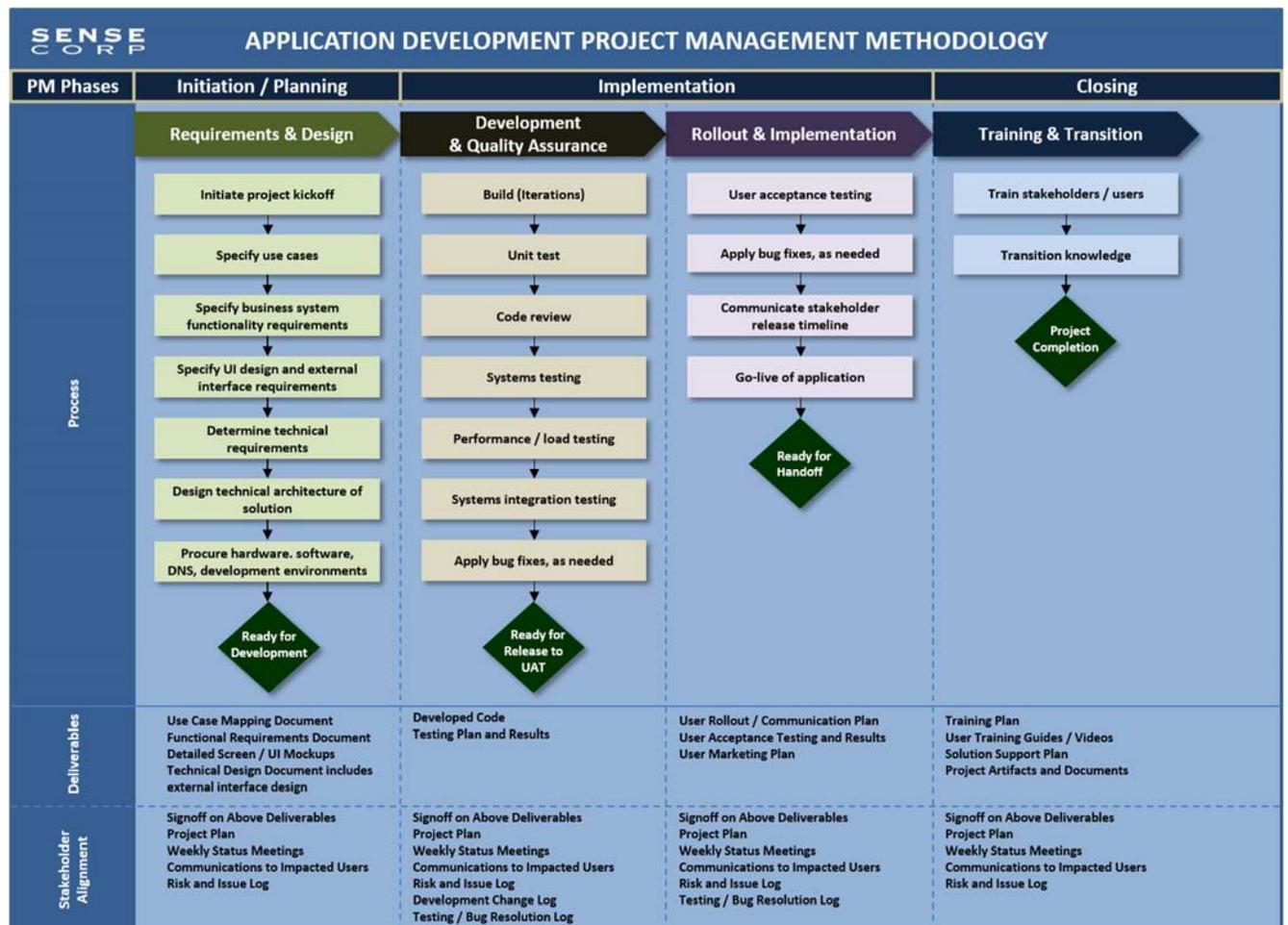
These checkpoints are also a method to clarify requirements during the development phase. Because the detailed analysis and development are done incrementally, tweaks to requirements can be incorporated with minimal rework or disruption to the delivery schedule. The proposed start and end dates for each deliverable are included in the Delivery Schedule.

Upon completion of the core application build, Team Sense Corp will begin a series of testing exercises to ensure the eProcurement application meets the requirements set forth in the SOW as well as those gathered during the Requirements Phase of the project. Our testing process includes the following phases: Unit, System, Performance and Load, System Integration, and User Acceptance. The testing process is detailed in the Testing Plan included in the Project Management Plan of this response.

# PROJECT MANAGEMENT APPROACH

## MANAGEMENT METHODOLOGY

For the development of the eProcurement System, Team Sense Corp will leverage its Application Development Project Management Methodology (ADPMM). Team Sense Corp established a proven application development project management methodology based on the Project Management Body of Knowledge (PMBOK) and other application development and project management best practices. The methodology is comprised of four work streams: Initiation/Planning, Development and Quality Assurance, Rollout & Implementation and Training & Transition. The work streams of the methodology are highlighted below:



- **Requirements and Design:** The requirements and design work stream activities include initiating the project kickoff, definition of use cases, gathering business, functional, and technical requirements, system architecture and design, and the creation and configuration of environments.
- **Development and Quality Assurance:** The development and quality assurance work stream activities include the building of the application through a series of development sprints, performing unit, system, performance, and integration testing along with any bug fixes discovered during testing activities.
- **Rollout and Implementation:** The rollout and implementation work stream activities include user acceptance testing (UAT), along with any bug fixes discovered during UAT, as well as communication to stakeholders on the upcoming release and application go-live.
- **Training and Transition:** The training and transition work stream activities include stakeholder and end user training and knowledge transition.

The Application Development Project Management Methodology will be executed by Team Sense Corp throughout the project. The Team Sense Corp project team is described in detail in the next section.

## PROJECT TEAM

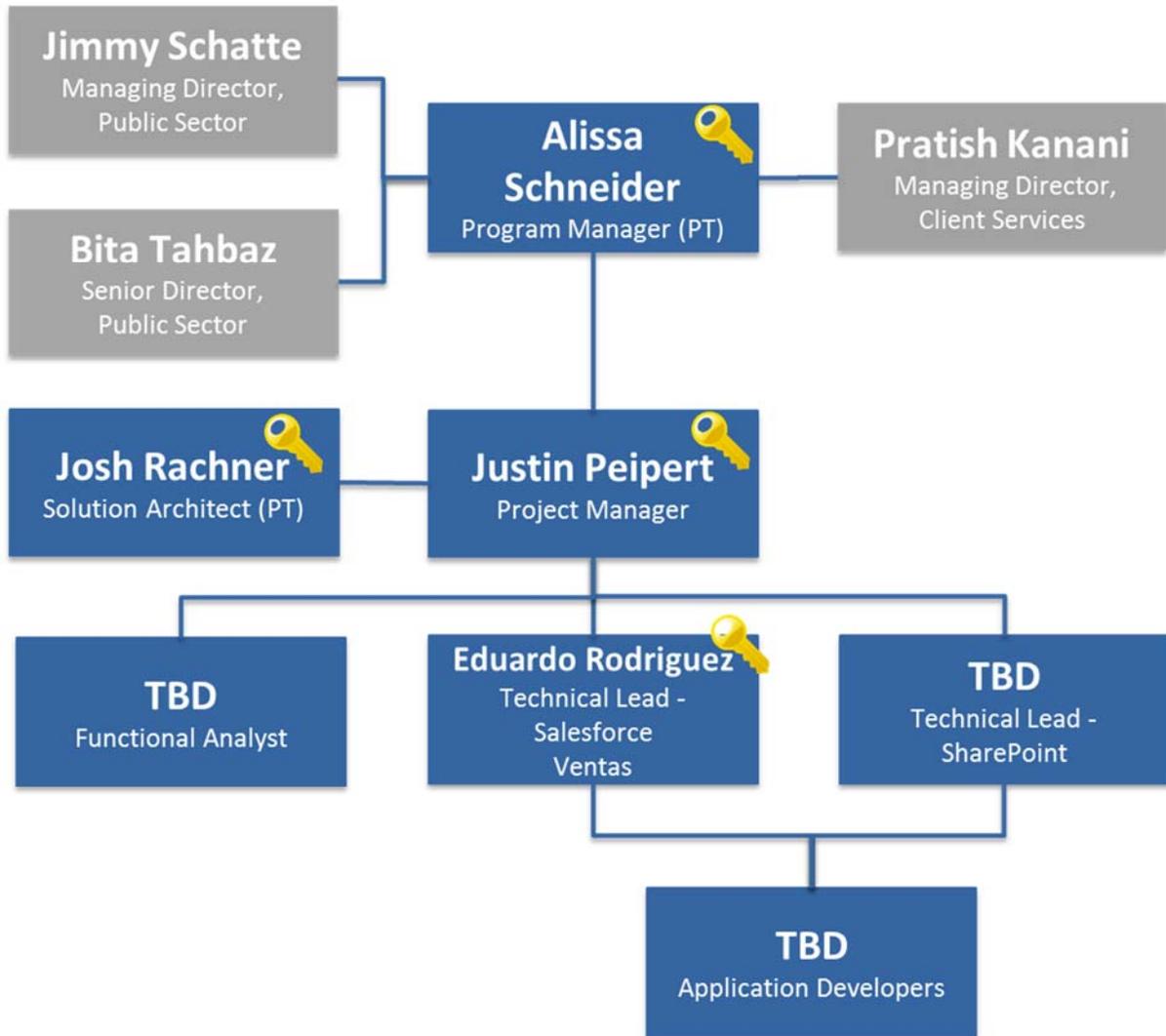
Team Sense Corp has two decades of experience managing complex technology modernization programs and knows how important the organization of the team is to the success of the project. We have put together a team we feel is uniquely qualified to successfully deliver the business value DIR seeks to achieve via the services solicited in this SOW. The key resources we have identified have significant expertise in delivering complex modernization projects and bring together the right mix of experience across government agencies, technology modernization efforts, web/mobile application delivery, and project management.

Our approach to all projects is very collaborative. We will partner with DIR in this effort as we feel that working collaboratively with the client is necessary to ensure success. The primary Sense Corp contact for the engagement of delivery resources will be **Alissa Schneider**, program manager in our Public Sector practice. Alissa will work with **Jimmy Schatte**, Managing Director of our Public Sector practice, to ensure the project is delivered in compliance with the contract, alignment with DIR expectations, and State of Texas standards. Alissa will also work with **Pratish Kanani**, Director of Client Services to ensure the project is properly staffed and resolve any staffing issues that may arise. Alissa will be engaged in the project on a part-time basis and will be responsible for the overall success of the project. **Bitia Tahbaz**, a Senior Director in our Public Sector, will also be engaged in the project in an advisory role on DIR application development and state procurement practices.

**Justin Peipert**, with deep project management and public sector experience, will be full-time on the ground leading the delivery team as Project Manager. He will work closely with **Josh Rachner** in the role of Solution Architect. Josh has architected web/mobile application solutions for other state agencies in Texas and was the solution architect on the DIR Marketplace ([dir.texas.gov](http://dir.texas.gov)) relaunch project. **Eduardo Rodriguez, from Ventas Consulting**, will lead the Salesforce development team as the Lead Developer. **Eduardo** has prior experience working with the City of Dallas on the contract management application built on the Force.com platform and has delivered several Salesforce projects. Finally, Justin will manage all additional resources needed for the project.

**PROPOSED TEAM STRUCTURE**

Sense Corp proposes a project organization that ensures accountability, transparency and effective delivery of the requested application development services detailed in the statement of work.



## KEY PERSONNEL

Below are resumes for personnel identified as key in the Proposed Team Structure Section.

### ***BITA TAHBAZ – SENIOR DIRECTOR, PUBLIC SECTOR***

As a Senior Director our Public Sector practice, Bitra manages several key client-partnerships for Sense Corp. She has broad experience in application development, spanning from strategy and planning to implementation, providing a breadth of knowledge to both public and private sector clients. She helps lead clients to better outcomes with an emphasis on high quality solutions. Bitra and her teams have successfully delivered innovative solutions in areas such as procurement and contract management as well as application development for the state of Texas. Prior to joining Sense Corp, she worked for Deloitte Consulting in the public sector practice focused primarily on large custom developed applications.

#### **Recent projects under her leadership in the last two years have included:**

- **Texas Health and Human Services Commission** – Enterprise Data Governance Program & Enterprise Master Data Management (across all 5 HHS agencies)
- **Texas Department of Information Resources** – Marketplace Project ([dir.texas.gov](http://dir.texas.gov))
- **The University of Texas at Austin** – Webhosting Architecture Modernization Program

Bitra graduated with a BBA in Management Information Systems and Bachelor of Arts in Spanish from The University of Texas at Austin.

**ALISSA SCHNEIDER – PROGRAM MANAGER**

Alissa is a program manager within Sense Corp with extensive experience in business strategy, implementation management, and business process experience. She specializes in understanding the business challenges clients face and dissecting those into manageable areas in order to drive change while maintaining focus on the client's overall vision and goals. She fosters a collaborative environment between business and technology stakeholders to ensure successful and mutually beneficial change. With her diverse experience within the private and public sectors and strong business and technical background, she brings assurance that projects under her direction are completed on time, within budget, and with a high level of quality.

**EXPERIENCE****Fortune 500 Climate Control Company - Lennox International Inc. (May 2016 – Current)**

- Interim Chief Data Officer responsible for standing up the Data Governance Office, aligning efforts to corporate strategy, and engaging stakeholders across the business to meet objectives and achieve success

**Fortune 500 Financial Services Company - New York Life Long Term Care Insurance (January 2015 – April 2016)**

- Managed effort to automate Claim Reserves calculation for the Actuary Department
- Automated ETL/PL-SQL solution replaced upwards of 40+ Excel workbooks; reduced 6 hours+ daily time spent down to a few minutes
- Implemented custom reporting solution to effectively manage all areas of the business utilizing newly implemented services as the firm moved large segments of their daily operations to a third-party outsourced model

**Major Lead Producer - The Doe Run Company (September 2014 – December 2014)**

- Project managed and developed POC to determine the use of the new technology, Birst, for data analysis and business intelligence related to mining equipment
- Responsible for data modeling and data integration to combine data from a mainframe system and PeopleSoft
- Partnered with Birst to ensure Best Practice development standards were implemented
- In 6 short weeks, the client identified a single piece of equipment that would save them \$750,000 utilizing the new POC

**Texas State Government Agency - Health & Human Services Commission (March 2014 – September 2014)**

- Managed multi-million dollar Medicaid Enterprise Data Governance project to operationalize data governance across the five agencies that comprise the Health and Human Services Enterprise (DADS, DARS, DFPS, DSHS, HHSC).
- Project focused on collection of metadata across 28 source systems, design of master record structures at an agency and Enterprise level, and creation/design of policies, processes, standards, and metrics in order to stand up the first ever Chief Data Office
- Extensive effort focused on collaboration across agencies with excess of 200 identified stakeholders
- Managed team of nine (9) direct resources

**Texas State Government Agency - Department of Information Resources (February 2013 – August 2013)**

- Led development of “Anticipated IT Needs and Associated Spend for State Agencies for Biennium 83R” report, utilizing best practice statistical forecasting, business intelligence technologies, and data analysis expertise
- Collaborated with other state agencies to enable 360-degree perspective and increased collaboration amongst state agencies

**Fortune 500 Pharmaceutical Company – Mallinckrodt (September 2012 – April 2013)**

- Managed effort to assess current state SAP BusinessObjects Business Intelligence environment
- Directed and implemented SAP BusinessObjects XI 3.1 migration and upgrade
- Designed integrated security model; trained new users and trained client’s system administrator

**Texas State Government Agency - Employees Retirement System of Texas (November 2012 – December 2013)**

- Assessed current state Microsoft Business Intelligence environment
- Recommended a 12-month roadmap based on best practices and organizations’ future state vision

**Major Agriculture Lender and Financial Services Cooperative - Farm Credit Bank of Texas (April 2011- May 2012)**

- Managed a team of cross-functional resources to design, develop, test, and deploy the first data mart in the organization’s Enterprise Data Warehouse, after the organization had failed to deliver two prior times
- Contributed and led data governance strategies to align business processes with master data management techniques

- Led design and development efforts on a consolidated financial reporting solution that sourced and consolidated data from two loan platforms (capital markets and mortgage)

**Major Real Estate, Mineral Resources, and Fiber Resources Management Firm – Forestar (September 2008 – March 2011)**

- Designed data warehouse and BI reporting solution for enhanced financial and operational reporting
- Led to corporate-wide dashboard and standardized reporting utilizing OBIEE and integrated SharePoint environments
- Managed day-to-day delivery, business sign-off, and prioritization of development
- Mentored and trained junior staff

**Fortune 500 Healthcare Provider - Centene (March 2009 – June 2009)**

- Developed the first SAP BusinessObjects Xcelsius dashboard within the organization for release to internal and external health plan CEOs
- Designed the semantic layer (universe), WebI reports, and dashboard that included date logic, multiple contexts, multiple components driven off a single selector, and LiveOffice data refresh capability

**Leading Prepaid Debit Card Provider - NetSpend (December 2008 – January 2009)**

- Designed and implemented General Ledger data mart to support Budget vs. Actuals financial reporting
- Analysis of Oracle Financials source data; data model included 1 fact table, 10 dimensions, 2 hierarchies
- Design features include: Type 2 History Capture, Ragged Hierarchy Handling, Change Data Capture, Execution Status

**Non-Profit Cancer Awareness Organization – Texas 4000 for Cancer (July 2008 – August 2008)**

- Project managed CRM Implementation and Process Optimization project
- Directed the design and development efforts for a centralized customer management system enabling the organization to accurately track its donor base and each donor’s relationship to the organization
- Analyzed, consolidated, and cleaned over 140 disparate data sources and migrated the cleansed data into the new system
- Defined and implemented optimized processes and data capture methods in order to ensure quality data collection methods going forward
- Mentored and trained four newly hired employees, integrating company culture and drive for success

**Defense Electronics Company - Elbit Systems of America (May 2008 – July 2008)**

- Technical Team Lead - SAP BusinessObjects migration and implementation from 6.1 to XI 3.0
- Planned and executed BusinessObjects upgrade and migration activity
- Executed change management strategy to meet training and utilization goals

**Hospital Service Provider - Child Health Corporation of America (October 2007 – April 2008)**

- Lead Business Objects Reporting Developer
- Instrumental in creating and deploying outside-facing reporting environment utilizing newly-developed data warehouse
- Developed universes employing advanced functionality: Derived Tables, Aggregate Aware, Incompatibilities, Customized LOVs, and Predefined Conditions
- Created Web Intelligence reports based on existing, out-of-date Crystal 9 reports. Employed advanced functionality: input/output contexts, alerters, custom charts. Customized for export capability to PDF or Excel.
- Pioneered Change Management process between multiple technical environments

**Fortune 500 Energy Corporation - CenterPoint Energy (July 2007 – October 2007)**

- Technical Analyst – BusinessObjects migration and implementation from 5.1.8 to XI R2
- Audited and analyzed 5.1.8 environment to prepare for migration
- Configured clustered, failover Production environment incorporating LDAP authentication

**EDUCATION**

- Case Western Reserve University & Cleveland Institute of Music, Cleveland, OH
- Bachelor of Music; Major: Voice
- Academic Honors

**CERTIFICATIONS**

- Certificate: The CIO Institute, The University of Texas at Austin
- Microsoft Certified Database Administrator (MCDBA) – SQL Server
- Master Certified Internet Web (CIW) Designer
- Microsoft Office Specialist (MOS): Access

**TECHNOLOGY**

- Business Intelligence: SAP BusinessObjects, MS SQL Server Analysis Services, Oracle Business Intelligence, Birst
- Database Management Systems: Oracle, MS SQL Server, IBM DB2, Microsoft Access
- ETL: Oracle Warehouse Builder, IBM DataStage
- Data Warehouse Architecture and Data Modeling: Enterprise Architect, ERWIN, Visio
- Procedural Languages: SQL, Oracle PL/SQL
- Enterprise Content Management: MS SharePoint
- Business Systems: CLTCAS/XRM (LTCG), Claim Administrative System (Pega), FutureFirst, J.D. Edwards, Oracle Financials, PeopleSoft, P2 Excalibur, Loan IQ, Salesforce.com, SharePoint, E-Procurement Systems
- Project Management: MS Project

## **JUSTIN PEIPERT – PROJECT MANAGER**

Justin Peipert is senior project manager with Sense Corp and has been a key team member across multiple large-scale systems integration initiatives. His experience includes various aspects of planning, requirements gathering, problem solving, data analysis, development, documentation, implementation, and testing. Justin also has an extensive background in business intelligence, data integration, and application development.

## **EXPERIENCE**

### **Automotive Warranty Company - EasyCare (March 2016 – Present)**

- Led an Assessment of the existing data warehouse environment in order to provide the client with strategic direction and a data warehouse roadmap.
- Worked with team to manage the project plan, set/manage the expectations of the client, manage resources according to the needs of the project, and facilitate discovery and design sessions.
- Conducted client interviews with business and technology representatives to understand and document the current state of the data warehouse environment and the business needs that they environment met.
- Facilitated future state discussions with business stakeholders and executive suite to drive out the future capabilities required of the data warehouse to meet the strategic goals of the client.
- Worked with the on-site team to architect a high level systems blue print to address the future state goals.
- Developed a road map for data warehouse build activities that accounted for a changing technology environment and socialized the roadmap with business stakeholders and the executive suite.

### **Lease Asset Management Company - Enterprise Fleet Management (October 2015 –March 2016)**

- Served as the Project Manager for the delivery of the Enterprise Fleet Management Data Warehouse within an Oracle Database environment with reports delivered through the Oracle Business Intelligence reporting suite.
- Implemented the Savings Data Mart that captures 3<sup>rd</sup> party provider maintenance data and combined it with Enterprise Data from multiple internal systems to provide holistic reporting functionality to both Enterprise Users and Customers.
- Implemented the Performance Reporting Data Mart to enhance internal employee performance tracking, analysis, and auditing.
- Implemented the Billing/Invoicing Mart to provide Enterprise Customers with greater insight into their current, historical and future invoicing data to enable better management of their vehicle fleet costs.

**Texas State Government Agency – DPS (July 2015 - August 2015)**

- Served as the Project Manager on the effort to develop a number of solution options and business cases for the deployment of a civilian mobile image capture software that would support the Drawbridge border initiative.
- Facilitated requirements gathering sessions to ensure the needs of the involved agencies were clear and being addressed.
- The existing architecture for the Drawbridge application (installed cameras along the border sending images to DPS for analysis) was documented and analyzed for integration requirements.
- Four approaches to deploying an integrated mobile application were identified and the business case for each was developed.

**Fortune 1000 Heating & Cooling Manufacturer (January 2015 – June 2015)**

- Served as the Project Manager and solution architect for the delivery of the Residential Sales Analytics Data Warehouse.
- Worked with project team to develop and manage the project plan, set/manage the expectations of the client, and manage resources according to the needs of the project.
- The data warehouse:
  - supported the Residential Sales Group in doing more detailed customer / product analysis
  - reduced the time spent producing monthly reporting
  - provided more detailed granularity into the clients sales data
  - Served as the foundation for Data Mart development moving forward

**FinTech Company Brokering Merchant & Lender Relationships (September 2014 –November 2014)**

- Served as the Project Manager with an expertise in lending processes and risks.
- Facilitated the defining of a new lending process for NewComLink, who up to that point had been operating as a technology company that links retail stores with lenders willing to provide term loans to their retail customers.
- Lead the effort to document all high level processes required to take a loan from the Point of Sale through to collections.
- The process documentation facilitated conversations with the clients' Investors, future Investment Facilities, 3rd party loan services, and banks under which the client would operate its lending activities.

**Texas Department of Transportation (August 2014)**

- Brought on to TxDOT for a short effort focused on closing out a Project Management training initiative by completing the Learning Management Map. This map served as the roadmap for future initiatives and internal training development.

- Worked with the on-site team to estimate time/effort for the next phase of the project of the Project Management training initiative to facilitate the planning and budgeting process.

#### **Texas Health and Human Services Commission (May 2014 –July 2014)**

- Facilitated the definition, drafting, and agreement of policy for the centralized metadata repository covering each agency under HHSC management. This required the coordination of resources across agencies, the development of standardized policy for health metadata, and validation of those policies with the agency legal representatives.
- Created the initial Deliverable Expectation Document for the Enterprise Change Management Policies and Procedures documentation regarding data Governance. This required the defining of the HHSC Data Governance teams’ expectations of the Deliverable and required me to guide the team through what they should expect from the change process.
- Drafted the high level processes and policies for managing data governance policy changes within the differing agencies.

#### **Mid-Sized Mortgage Lender (February 2014 - April 2014)**

- Contributed to initial scoping discussions to set client and Sense Corp expectations
- Manage team and resources to facilitate Pulaski’s selection of an Loan Origination System
- Collaborating in the detailed requirements gathering for and selection of the technology for the Loan Origination Solution
- Coordination of product demonstrations and collation of participant feedback
- Developing and maintaining the tool evaluation framework documentation
- Delivery of Final Tool Evaluations with top Vendor Selected

#### **Texas Comptroller of Public Accounts (February 2013 – December 2013)**

- Managed a six month assessment of a content management system utilized by 1600+ Agency employees and integral to the collection of Texas state taxes (nearly 12,000,000 pages of content per annum)
- Managed a team of four core consulting resources and 7 extended client team resources
- Facilitated requirements gathering sessions (current and future state) across 11 divisions and inclusive of 80+ Agency personnel to understand the needs of the organization (Revenue Processing, Account Maintenance, Revenue Accounting, Audit, Enforcement, etc....)
- Collaborated closely with client technical personnel to design a high level future state solution for the Agencies’ content management needs that would reduce the complexity of the systems maintenance and enhance the user experience and functions
- Managed the project schedule and Road-mapped the effort to implement the ECMS solution given the needs for integration in an environment where multiple divisions required differing functionality and access

- Facilitated an initial Change Management Workshop to understand the challenges regarding large enterprise implementations within the Agency and educate the client in how to approach addressing these challenges
- Developed a Change Plan in conjunction with the client that laid down an approach for the core team to take in addressing the scale of change that would be involved with an implementation of a new ECMS solution at the Agency

**Leading Business Aviation Services Company (September 2012 – December 2012)**

- Managed the vendor selection process to identify the tool/vendors to meet the needs for enterprise content management within the organization, focusing particularly on the accounting/finance departments
- Managed a team of 3 resources and relationship/negotiation with 8 3rd party vendors
- Managed the project schedule and Road-mapped the effort to implement the solution given the needs for integration in an environment where both the financial and operations systems were deploying entirely new technical systems and procedures
- Facilitated requirements gathering workshops to understand the needs of the organization (Accounting, Finance, Human Resources, Global Partnership Management, Operations)
- Identified a shortlist of vendors to meet the requirements of the organization
- Managed the due diligence process to evaluate the selected vendors ability to technically meet the needs of the organization and successfully implement their proposed solutions
- Facilitated the demonstration of the differing vendor solutions with a 12 person selection team
- Consolidated and summarized feedback from the selection committee and analyzed that feedback across a range of defined selection criteria in order to select the vendor and solution to be implemented
- Documented findings, business and technical requirements/processes to support implementation project of selected tool

**Leading Business Aviation Services Company (February 2012 – August 2012)**

- Performed an enterprise wide analysis of the current state financial system and processes to understand pain points within the organization and identify areas of inefficiency associated with their corporate financials and billing departments
- Managed a team of 4 resources and 5 3rd party technical consultants
- Facilitated requirements gathering workshops to understand the needs of the organization around a corporate financial solution to replace the existing financial system and processes
- Performed a Gap analysis and identified processes and technologies that would further facilitate the clients business processes and allow better management through more accurate and transparent data

- Managed the project schedule and Road-mapped the effort to implement the Financial System solution given the needs for integration in an environment where multiple operating lines of business were deploying entirely new technical systems and procedures
- Worked in concert with the Chief Financial Officer and Corporate Controller to develop and deliver the business case for the implementation of the new ERP and billing system to replace the existing Oracle financials tool

**Subprime Mortgage Servicing Company (September 2010 - December 2011)**

- Participated in Requirements gathering for the Servicing Advance Facilities Replacement application and reporting suite (This application supports all cash flow requirements for the client)
- Conducted analysis and design sessions to architect a solution for the replacement of the existing Servicing Advance Facility toolset
- Designed and developed the SAF data mart to support SAF reporting
- Designed and Developed approximately 25 reports for each of the 3 facilities supported by the SAF application
- Provided data analysis skills to define requirements for the SAF application in order to support the SAF reporting needs
- Managed 2 local resources and 3 international resources to design and develop the relevant tools to manage the Mortgage Servicers cash flow

**Subprime Mortgage Servicing Company (March 2010 – August 2010)**

- Architected, Installed and Configured the Oracle Business Intelligence reporting software suite in a clustered 3 tiered environment
- Designed and Developed the reporting environment for the ICAR (Investor Contract References) application
- Development included in excess of 120 reports across 9 Dashboards to facilitate the dissemination of Investor contract terms and requirements to 3,000+ users
- Worked with the Business Representative in the legal department to fine tune the reporting environment and understand the relationship between each Investor contract and the parties associated with the Legal Documentation to allow the Mortgage Servicer client to better run and manage their business

**Physician Owned Healthcare Service Provider (January 2010 – March 2010)**

- Completed analysis and design of customized reports to support management of membership coverage
- Developed 30 operational reports to facilitate patient reporting
- Conducted report testing with the client user group to validate design and development

**Global (Oil Field Services)/Aircraft Company (August 2009 – January 2010)**

- Collected requirements for the implementation of a Hyperion Financial Management Consolidation application
- Interviewed and documented 15 Operating Managers, 5 Accountants and the CAO spanning the globe (Gulf of Mexico, England, Scotland, Nigeria, Australia, South America) to drive out requirements and Design Documentation
- Learned the Legacy COGNOS Financial Consolidation tool in order to extract historical data and test the implementation of the HFM application while running the two systems in parallel
- Facilitated Training on HFM product (Multiple 3-day classes in Houston and London)

**Residential Equipment Manufacturer (January 2009 – July 2009)**

- Installed and configured Business Objects Enterprise in the Development, QAS, and Production Environments
- Assisted in Installation and Configuration of the Sales Rapid Mart
- Manage the Functional and Technical components associated with the clients sales reporting customization effort, including report design/build and universe design as well as client interface and requirements gathering
- Conducted Product Demonstrations, User Training, and was involved with User Acceptance Testing
- Installed and Configured Knowledge Accelerators for WebIntelligence, Crystal Reporting, Xcelsius, Dashboard Builder, Live Office
- Installed and Configured Live Office and Xcelsius reporting tools

**Oilfield Services Company (September 2008 – November 2008)**

- Installed and configured Business Objects Enterprise and Data Services in the Development and QAS Environments
- Assisted in Installation and Configuration of the Human Resources Rapid Mart
- Responsible for the migration of ABAP code generated by Data Services and the modifications to that ABAP where necessary

**Medical Literature Distributor (October 2011 – December 2011)**

- Installed and configured a clustered OBIEE reporting application within both the QA and Production Linux environments
- Provided report development expertise and best practices for OBIEE development
- Outlined best practices for deployment testing

## EDUCATION

### **The University of Texas at Austin**

- Bachelor of Business Administration
- Major: Business Honors and Corporate/Investment Finance, Minor: Management Information Systems

## TECHNOLOGY

- Oracle Business Intelligence Enterprise Edition (Clustered Deployment)
- SAP Business Objects Enterprise
- Microsoft SQL Server Analysis Services
- Pro-Clarity (Data mining user interface)
- Business Objects Data Services (Non-Technical Understanding)
- Business Objects Xcelsius
- Business Objects Live Office
- Microsoft SQL Server Database
- Oracle 10g, 11g
- Procedural Languages: SQL SERVER TSQL, Oracle PL/SQL
- Data Warehouse Architecture and Data Modelling: Visio, ERWIN, Developer
- Migration and Deployment: JIRA, NEXUS

***JOSH RACHNER – SOLUTION ARCHITECT***

Josh is a Senior Technical Consultant with Sense Corp and plays a key role in the firm’s technical expertise. He has a strong focus in web and mobile delivery, application development, system and data integration, enterprise content management, business intelligence, and overall system architecture. His technical skill set and understanding of business needs allows him to excel at all facets of the delivery and project lifecycle. Josh’s passion and forward-thinking attitude allows him to effectively deliver business technology solutions in various industries across the public and private sectors.

**EXPERIENCE**

**Leading Medical & Transportation Management – MTM (January 2016 – Present)**

*Electronic Data Interchange (EDI) Assessment and System Enhancements*

- Led rapid assessment initiative to understand the current state of EDI operations and provide a set of recommendations and a roadmap for improving client’s EDI maturity
- Met with 15+ Business and IT resources across EDI, Accounting & Finance, Reporting, and Application Development to identify gaps and opportunities across people, process, and technology
- Provided future state vision that is capable of supporting the company’s expected growth of doubling revenue from \$500M to \$1B over the next 5+ years
- Currently executing first set of projects to enhance overall EDI and Reporting operations

**Public Sector Transportation – Texas Department of Transportation (March 2015 – Present)**

*Enterprise Information Management (EIM) Strategic Assessment and Execution*

- Conducted current state assessment effort involving 50+ interviews and 20+ organizations, to understand the pain points, gaps, and risks with information management across the agency
- Focused on ECM, big data and analytics, information governance, and application integration, to provide a 2-year and 8-year roadmap for achieving the future state vision
- Designed and developed the Portfolio & Project Management internal portal, including custom theming, interactive career development tool for project managers, and analytics dashboard
- Served as technical architect for the EIM initiative – client now entering into the first set of key initiatives that are foundational to the growth and momentum of the EIM program

**St. Louis Based Non-Profit Organization – College Bound (October 2013 – Present)**

*Web Portal Design, Architecture, and Implementation*

- Worked with creative marketing firm to develop a custom application for an internal web portal that supports 10K+ users across school districts and college access organizations

- Delivered technical documentation for the overall system architecture and application design, to ensure compatibility and usability across mobile, tablet, and desktop devices
- Leveraged a cloud-based, platform-as-a-service, rapid application development framework for implementing the web application and integration points with other services
- Serving as the technical architect and advisor for the ongoing expansion and support of the platform

**Public Sector Technology Leadership – Department of Information Resources (January 2014 – February 2015)**

*Public-facing Website Design, Architecture, and Implementation*

- Reviewed extensive set of requirements and application specifications with IT and the business to ensure cohesiveness and consistency between all departments in the agency
- Worked with creative marketing firm to develop a customer-centric, ADA compliant (WCAG 2.0 AA), fully responsive (mobile/tablet/desktop), web 2.0/3.0 interface for the new external website
- Delivered technical documentation for the infrastructure topology, back-end content management system architecture, overall integration strategy, and scalability approach
- Served as the technical architect and lead developer for the implementation of the new website platform, which received 70K+ pages views and 8.9K unique visitors in the first month of release

**Public Sector Protection – Department of Public Safety (July 2015 – September 2015)**

*Mobile Application Solution Evaluation & Recommendation*

- Reviewed current state application architecture and high-level requirements to understand the gaps, opportunities, and needs for a new public-facing mobile application for citizen use
- Produced 4 business cases that outlined different delivery approaches, comparing each option based on strengths, weaknesses, risks, ability to meet business needs, and cost-benefit-analysis
- Evaluated 6 mobile application development frameworks and outlined the pros/cons of each
- Served as the technical architect and advisor for ensuring successful project delivery

**Public Sector Financial Institution – Texas Comptroller of Public Accounts (March 2013 – August 2015)**

*ECM Assessment, Solution Architecture Design, and IV&V*

- Conducted current state, future state, and gap analysis for large-scale enterprise content management platform utilized as one of the core systems for processing tax-payer revenue in Texas
- Conducted technical interviews with key IT resources to understand the organization’s technology gaps, efficiencies, and roadmap to better articulate the business and technical needs
- Led design of high-level solution architecture for the new enterprise content management system; including hardware specifications, integration points, and overall data flow
- Created implementation plan for scoping the planning, design, development, and rollout of the new document imaging platform; also provided technical IV&V support for the implementation

**Leading Fleet Services Company – Enterprise Fleet Management (October 2014 – December 2014)***Web Portal and Business Intelligence Integration Implementation*

- Assessed integration options for business intelligence and data warehouse integration with public-facing web/mobile portal, focused on delivering metrics and reporting to customers
- Presented approaches, methodologies, and pros/cons for different API options to the management and development team to determine the leading option for information delivery
- Worked with 8 person development team to teach and implement the API integration approach for delivering metrics and report data from the business intelligence platform to the portal interface
- Developed the architecture and code base, and created the technical and support documentation

**Title Company Solutions Provider – EPIC Real Estate Solutions (July 2014 – September 2014)***Web Application Design, Requirements, and Implementation*

- Leveraged iterative and agile development process for rapidly prototyping application functionality and delivering demonstrations for executive-level review and feedback
- Worked with executive leadership to refine vision and applications needs, while educating on technology principals and level-of-effort for development activities
- Managed team of 6+ developers and designers across multiple geographical locations, while serving as lead developer and architect role to ensure device, browser, and mobile supportability
- Integrated application with 3+ external services for geo-location, fees, and address normalization

**Top Public Ivy University – The University of Texas at Austin (January 2013 – June 2014)***Web Infrastructure Assessment, Architecture Re-Design, and System Implementation*

- Conducted technical interviews with key stakeholders and IT resources to understand the history, progression, and challenges of the university's web tier and infrastructure
- Reviewed all core components of the infrastructure to deliver current state analysis; included evaluation of DNS, server architecture, database systems, storage, and identity management
- Evaluated public/private cloud options compared to traditional on-premise implementation, and made recommendations based on the organization's IT strategy and system requirements
- Implemented a 99.5% available web infrastructure to support hosting of 1,000 websites

**Leading Agriculture Lender & Financial Institution – Farm Credit Bank of Texas (June 2011 – August 2014)***ECM Assessment, Vendor Selection, and System Implementation*

- Conducted enterprise content management assessment and delivered a 3-year roadmap to execute against the future state vision of transforming the organization into a digital enterprise

- Reviewed over 6 vendors providing capture, document management, search, and workflow capabilities and selected vendor based on high-level requirements and business processes
- Co-led extensive requirements gathering process to define business and technical requirements; included 17 sub-organizations, 8 internal departments, and over 50 interviews
- Led design and implementation of a multi-tenant document imaging system used for indexing, managing, and retaining loan portfolio content based on strict security and retention policies

**Leading Agriculture Lender & Financial Institution – Farm Credit Bank of Texas (January 2011 – January 2012)**

*Software IV&V, EDW Design and Implementation, Enterprise Roadmap*

- Conducted independent verification and validation for complex loan accounting system to determine if the software could serve as the single platform for all loan accounting in the enterprise
- Led the technical design of the ETL architecture and dimensional data modeling for the credit reporting data mart; included the management of 5+ technical resources and developers
- Participated in the enterprise assessment initiative to define a 3-year roadmap to streamline and integrate the transactional/operational systems, BI/DW reporting, and the ECM platform
- Aided in the development of the multi-dimensional cube environment for the general ledger

**Leading Real Estate Development Company – Forestar Real Estate Group (October 2009 – June 2011)**

*Web Portal and Business Intelligence Integration Implementation*

- Conducted requirements gathering sessions to understand client needs for multi-tier web portal to be utilized for consolidating financial reporting, investment information, and spatial mapping
- Created business, functional, and technical requirements documentation for overall system design and reviewed the technical architecture with key stakeholders and IT resources
- Led implementation of web portal including real-time integration with business intelligence platform; developed 10+ highly-configurable custom applications and plugins
- Created roll-out/support documentation and led training sessions with business users

**Leading Business Aviation Services Company – Universal Weather & Aviation (February 2011 – May 2011)**

*Enterprise Applications Integration and Solution Architecture Planning*

- Collected project requirements, scope, data needs, and integration needs for 6 enterprise systems; included CRM, EDW/BI, MDM, Portal, Financial Accounting System, and Fuel Management System
- Conducted group work sessions with client to discuss business processes and system architectures, and produced detailed technical documentation and executive-level findings
- Designed high-level solution architecture and logical data flow for the overall system integration, leveraging real-time and two-way synchronization between core systems

- Defined a phased roll-out strategy through a series of recommendations and a 2-year roadmap, which resulted in a long-term partnership and numerous enterprise technology implementations

**Subprime Mortgage Servicing Company – American Home Mortgage Servicing (November 2011 – February 2012)**

*Enterprise Data Warehouse Quality Assurance Automation*

- Created testing strategy, approach, and methodology for the legacy enterprise data warehouse to ensure the integration and reporting standards were met based on the organization’s needs
- Designed and developed automated QA system and testing framework for data integration process to enable a scheduled unit and integration testing harness of the ETL framework
- Executed automated testing process and relayed findings and recommendations to developers for optimizing ETL processes and ensuring business and technical requirements were met
- Created detailed documentation and reporting based on results from testing activities

**St. Louis Based Non-Profit Organization – College Bound (August 2011 – November 2011)**

*Web-Based Cloud Data Management Solution Implementation*

- Managed project team of 9 new hires to execute 3 parallel initiatives in 10 weeks – with efforts spanning from strategic analysis and recommendations to tactical implementation
- Led design, development, and deployment of a web-based, cloud, data management solution for tracking organization and student information as part of a college counseling program
- Directed assessment that delivered a 5-year roadmap for the organization’s vision and strategy, which also turned into over \$1M in funding and a strong momentum
- Mentored new consultants on project lifecycle, business acumen, and technical competency

**St. Louis Based Non-Profit Organization – Wyman (July 2009 – December 2009, May 2010 – November 2010)**

*Web Portal Requirements, Design, and Implementation*

- Drove discussions with client to gather requirements and understand application specifications, while serving as the lead technical resource and mentor for newly hired developers
- Created functional and technical requirements documentation based on findings and needs, and reviewed with client through a series of collaborative sessions
- Led technical implementation of web portal with a team of application developers and analysts, which included the development of custom components for user security, reporting, and administrative-level content and data management

**EDUCATION**

- Major in Information Systems, The University of Texas at Austin [McCombs Business School]
- Minor in Computer Science, The University of Texas at Austin [College of Natural Sciences]
- Certified in Elements of Computing, The University of Texas at Austin [College of Natural Sciences]

**TECHNOLOGY**

- Object-Oriented Languages: Java, C/C++, C#, Visual Basic, Ruby, PHP
- Web Frameworks: ASP.NET Web Forms, ASP.NET MVC, Ruby on Rails
- Markup & Styling: XHTML, XML, KML, CAML, XSLT, CSS
- Client-Side Scripting: JavaScript, JQuery, AJAX
- Web Service APIs: WSDL/SOAP, REST, OData
- Procedural Languages: PL/SQL, T-SQL
- Scripting Frameworks: Bash, Batch, PowerShell, R
- Operating Systems: Unix, Linux, Windows, Mac OSx
- Database Systems: Oracle, SQL Server, DB2, MySQL, Access, MongoDB
- Data Integration/Reporting: SSIS, SSRS, OWB, OBIEE
- Portal & ECM: Microsoft SharePoint, KnowledgeLake, IBM FileNet, Oracle WebCenter, WordPress
- Development Tools: Visual Studio, Notepad++, PowerShell Plus, TextMate, VI
- Modeling Tools: Enterprise Architect, ERwin Data Modeler
- Rapid App Dev (RAD): OutSystems Platform

**EDUARDO RODRIGUEZ**

**PROFESSIONAL  
SUMMARY**

Bilingual Professional with over 12 years of experience in IT Consulting, including Salesforce Sales Cloud, Service Cloud, Force.com and Front-End and Back-End Development. Additionally, experience with Cisco Technologies such as Unified Communications, Contact Centers Implementations, Video Conferencing and Data Networking.

Five years of experience managing and leading a team of 20+ Systems Engineers in a large territory covering Texas and New Mexico. Experience managing a Professional Services portfolio with total revenue of \$4M+ per year.

Highly Technical individual with exceptional software development skills, business acumen, teamwork attitude and pre-sales skills.

**CURRENTLY HOLDS THE FOLLOWING CERTIFICATIONS:**

- Salesforce Certified Advanced Developer (DEV-501)
- Salesforce Certified Developer
- Salesforce Certified Administrator and Advanced Administrator
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Sales Cloud Consultant
- Cisco Certified Internetwork Expert (CCIE)

Holds an MBA from the University of Texas at El Paso and has 12 years of experience in sales and delivery of large IT services engagements, including projects for State Agencies, Healthcare and Private Sector organizations.

**TECHNICAL SKILLS  
SUMMARY**

**SOFTWARE DEVELOPMENT:**

Salesforce (APEX/Visualforce), Lightning Components, JavaScript, HTML/CSS

**IMPLEMENTATION OF PROFESSIONAL SERVICES ENGAGEMENTS WITH LARGE ENTERPRISE ORGANIZATIONS INCLUDING:**

Several of Projects ranging from \$5K to \$1 Million in Professional Services, including:

- City of Dallas Contract Management Application built on the Force.com Platform

- State of Texas Department of Aging and Disability Services Time and Project Management Application built on the Force.com Platform

Experience with projects in the following technologies: Salesforce Platform, Salesforce CRM, Salesforce Service Cloud, Ruby on Rails, Call Scripting Programming in Cisco IPCC Express for Advanced Call Routing using Agent Groups, Skills based Routing or Custom Based Routing. Email and Chat Contacts Routing using Cisco's IPCC Express and E-gain Software. Design of Video Conferencing Solutions to improve team's collaboration and reduce travel costs.

**EXPERIENCE**      **SR. SALESFORCE CONSULTANT – VENTAS CONSULTING – SEP 2014 - PRESENT**

Responsible for the implementation of Salesforce.com client projects. Client-facing position that hold end-to-end engagement responsibilities including requirements gathering and documentation, implementation, knowledge transfer and overseeing the production of deliverables.

**DIRECTOR OF PROFESSIONAL SERVICES, PRESIDIO - JAN 2008 – AUG 2014**

P&L Responsibility for Service Delivery in Central Texas, West Texas and New Mexico. Lead and Managed a team of 20+ Consulting Engineers and a Project Portfolio of over \$4M+ per year in Professional Services including Data Center and Private Cloud Implementations, Unified Communications and Contact Center Projects and several Routing and Switching and Security Engagements.

Provide Technical Leadership for Service Delivery and responsible for the structure and delivery of advanced technical solutions.

**PRE-SALES ENGINEER, INX INC (ACQUIRED BY PRESIDIO) 2005-2008**

Responsible for Pre-Sales for Unified Communications and Contact Center Solutions. Responsible for proposal preparation, bill of materials, scope of work creation and services pricing.

**DELIVERY ENGINEER, NETWORK ARCHITECHS (ACQUIRED BY INX INC) 2002 - 2005**

Responsible for implementation of Network and Unified Communications Projects

**LANGUAGES**      English and Spanish

**EDUCATION AND**      **UNIVERSITY OF TEXAS AT EL PASO, MBA**

**CERTIFICATIONS**

Master in Business Administration, 2008

**MONTERREY TECH (ITESM), COMPUTER SYSTEMS AND ELECTRONIC ENGINEERING**

Graduated with Honors 2002

**UNIVERSITY OF TEXAS AT AUSTIN – ELECTRICAL ENGINEER**

Exchange Student – 1 Semester

**SALESFORCE**

Salesforce Certified Advanced Developer (DEV-501), Developer, Administrator, Advanced Administrator, Sales Cloud and Service Cloud Consultant

**CISCO**

Cisco Certified Internetwork Expert – Voice Track (CCIE)

# PROJECT MANAGEMENT PLAN

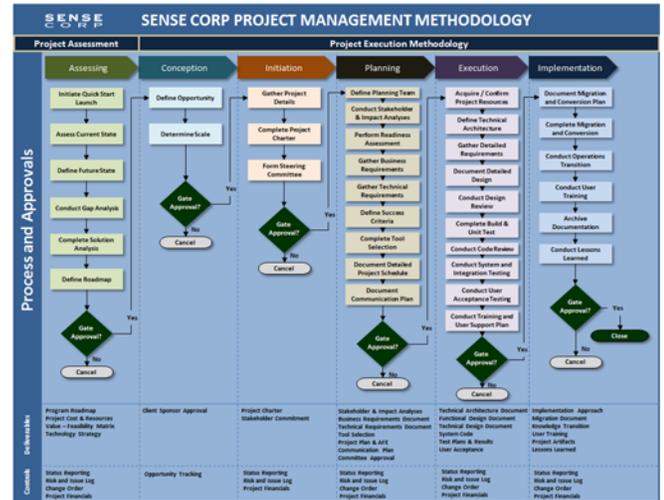
Team Sense Corp has a proven project management approach and methodology that has been developed by leveraging the Project Management Body of Knowledge (PMBOK) and other project management best practices. This methodology is a core component of our Project Management service offering and aligns with the DIR Project Delivery Framework.

Our Project Management Methodology will integrate into the existing DIR project governance process to ensure project success. All Team Sense Corp consultants are trained in the methodology to ensure quality and consistency. Additionally, this methodology is readily accessible to our delivery staff in a web-based format in the *Knowledge Center* section of our internal portal. The *Knowledge Center* site provides the methodology steps along with templates, example deliverables, best practices, tips and tricks, industry information, and a wealth of other resources to ensure that project teams have the necessary tools.

In addition, the methodology includes various phases which are managed by approval gates where specific deliverables need to be provided in order to proceed. Sense Corp has defined templates and samples for these deliverables to allow our project teams to be able to quick-start the development process.

An integral component of our Project Management Approach is the formalization of a Project Management Plan consisting of a comprehensive tool set of management documents designed to plan, track and manage the project including the following:

- Schedule Management Plan
- Risk Management Plan
- Quality Management Plan
- Change Management Plan
- Communication Management Plan
- Training Plan
- Testing Plan
- Knowledge Transfer Plan



Upon project initiation, Team Sense Corp will meet with project stakeholders to ensure Sense Corp project management processes, as defined by our Project Management Plan, align and integrate with the existing DIR project management structure.

The sections below provide the contents of our project management plans. The Project Schedule is located within the Schedule Management Plan.

**NOTE: This document will need to be updated upon contract award.**

## **1.0 INTRODUCTION**

### **1.1 Project Overview**

The purpose of this project is to provide enhanced functionality and technology to support the Texas Department of Information Resources (DIR) procurement and contracting business processes. Procurement is a strategic function that consists of the competitive actions required for the creation and administration of contracts. Currently, the State of Texas manages its Vendor registration through the Statewide Procurement Division of Texas Comptroller or Public Accounts (SPD) Central Master Bidders List (CMBL). SPD also handles various statewide (multiple-agency, multiple-government) contracts, and a limited number of agency specific contracts on the TXSmartBuy system- the State's Online Ordering system [www.window.state.tx.us/txsmartbuy/](http://www.window.state.tx.us/txsmartbuy/). The Awarded Vendor shall provide, in accordance with the terms of the Statement of Work and Attachments to include and not be limited to, all services reasonably associated with the provision of an eProcurement solution, assessment and analysis of DIR current environment, recommendation of methodology for implementation, implementation plan, implementation services, training, maintenance and support, and further development or customization as desirable and applicable.

### **1.2 Document Purpose**

The purpose of the Project Management Plan is to describe how the project is going to be managed and specifically provide guidance to the project team and stakeholders on how to execute the project.

## 2.0 SCHEDULE MANAGEMENT PLAN

### 2.1 Schedule Management Approach

The project schedule will be created using MS Project or a similar tool starting with the deliverables identified in the project's SOW. Activity definition will identify the specific activities which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of tasks and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete tasks. Resource estimating will be used to assign resources to work tasks in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. Once this is achieved the project sponsor will review and approve the schedule and it will then be baselined.

The following will be designated as project artifacts for the project schedule:

- Project Plan and Schedule
- Project Kick-Off Presentation
- Functional Requirements Document
- Solution Architecture and Design Document
- Test Cases/Results
- Training Materials
- Deployment Plan
- Weekly Status Report
- Change Control Weekly Report
- Issue and Risk Logs

Roles and responsibilities for schedule development are as follows:

The project manager will be responsible for facilitating task definition, sequencing, and estimating duration and resources with the project team. The project manager will also create the project schedule using MS Project or a similar tool and validate the schedule with the project team, stakeholders, and the project sponsor. The project manager will obtain schedule approval from the project sponsor and baseline the schedule.

The project team is responsible for participating in task definition, sequencing, and duration and resource estimating. The project team will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

The project sponsor will participate in reviews of the proposed schedule and approve the final schedule before it is baselined.

The project stakeholders will participate in reviews of the proposed schedule and assist in its validation.

## **2.2 Schedule Control**

The project schedule will be reviewed and updated as necessary on a weekly basis with actual start, actual finish, and completion percentages which will be provided by task owners.

The project manager is responsible for holding weekly schedule updates/reviews; determining impacts of schedule variances; submitting schedule change requests; and reporting schedule status in accordance with the project's communication plan.

The project team is responsible for participating in weekly schedule updates/reviews; communicating any changes to actual start/finish dates to the project manager; and participating in schedule variance resolution activities as needed.

The project sponsor will maintain awareness of the project schedule status and review/approve any schedule change requests submitted by the project manager.

## **2.3 Schedule Changes and Thresholds**

If any member of the project team determines that a change to the schedule is necessary, the project manager and team will meet to review and evaluate the change. The project manager and project team must determine which tasks will be impacted, variance as a result of the potential change, and any alternatives or variance resolution activities they may employ to see how they would affect the scope, schedule, and resources. If, after this evaluation is complete, the project manager determines that any change will exceed the established boundary conditions, then a schedule change request must be submitted.

Once the change request has been reviewed and approved the project manager is responsible for adjusting the schedule and communicating all changes and impacts to the project team, project sponsor, and stakeholders. The project manager must also ensure that all change requests are archived in the project records repository.

## **2.4 Scope Change**

Any changes in the project scope, which have been agreed upon by Team Sense Corp and the project sponsor, will require the project team to evaluate the effect of the scope change on the current schedule.

If the project manager determines that the scope change will significantly affect the current project schedule, he/she may request that the schedule be re-baselined in consideration of any changes which need to be made as part of the new project scope. The project sponsor must review and approve this request before the schedule can be re-baselined.

## **2.5 Preliminary Project Schedule**

To ensure that DIR is provided with dependable task planning, execution, tracking and reporting throughout the eProcurement Application Development Project, Team Sense Corp has developed a preliminary, project schedule with phases, tasks, durations, and roles / responsibilities for Team Sense Corp. Team Sense Corp anticipates using this plan upon project initiation and will adjust accordingly before submitting as the Project Schedule deliverable.



Assuming a project start date of September 5, 2016 our proposed project schedule has an anticipated duration of seven months for requirements, analysis, design, development, testing, and rollout with a target go-live date of March 24, 2017. Below is the project schedule for the following phases: Planning & Discovery, Requirements, and Core Application Build. These phases occur between September 5, 2016 and January 13, 2017.

Phase	Resource	5-Sep	12-Sep	19-Sep	26-Sep	3-Oct	10-Oct	17-Oct	24-Oct	31-Oct	7-Nov	14-Nov	21-Nov	28-Nov	5-Dec	12-Dec	19-Dec	26-Dec	2-Jan	9-Jan	
		Wk1	Wk2	Wk3	Wk4	Wk5	Wk6	Wk7	Wk8	Wk9	Wk10	Wk11	Wk12	Wk13	Wk14	Wk15	Wk16	Wk17	Wk18	Wk19	
<b>Planning &amp; Discovery</b>		■																			
Confirm Project Schedule	PM	■																			
Project Kickoff Presentation	PM	■	■																		
Project Preparatory Work	PM, SA, FA	■	■	■	■	■															
<b>Requirements</b>			■																		
Functional Requirements	PM, FA		■	■	■	■	■														
Solution Arch/System Design Doc	PM, SA, TL-SF, TL-SP,		■	■	■	■	■														
<b>Core App Build-Sprints (2 wks each)</b>						■															
Setup and Configuration	SA, TL-SF, TL-SP, D-SF, D-SP					■	■	■	■	■											
Sprint 1	SA, TL-SF, TL-SP, D-SF, D-SP					■	■		■	■											
Sprint 2	SA, TL-SF, TL-SP, D-SF, D-SP								■	■											
Sprint 3	SA, TL-SF, TL-SP, D-SF, D-SP										■	■									
Sprint 4	SA, TL-SF, TL-SP, D-SF, D-SP												■	■							
Sprint 5	SA, TL-SF, TL-SP, D-SF														■	■				■	■

PM – Project Manager  
 SA – Solution Architect  
 FA – Functional Analyst  
 D-SF – Salesforce Developer  
 D-SP – SharePoint Developer  
 TL – SP – Technical Lead  
 SharePoint  
 TL – SF – Technical Lead  
 Salesforce



Below is the project schedule for the following phases: Testing, Training, and Final Deployment. These phases occur between December 5, 2016 and March 24, 2017. Upon final deployment, the project will transition to post implementation support. The duration of the post implementation support will be 90 days or determined during final negotiations with DIR.

Phase	Resource	5-Dec	12-Dec	19-Dec	26-Dec	2-Jan	9-Jan	16-Jan	23-Jan	30-Jan	6-Feb	13-Feb	20-Feb	27-Feb	6-Mar	13-Mar	20-Mar
		Wk14	Wk15	Wk16	Wk17	Wk18	Wk19	Wk20	Wk21	Wk22	Wk23	Wk24	Wk25	Wk26	Wk27	Wk28	Wk29
<b>Testing Phase</b>																	
Test Planning/Prep	FA, TL-SF																
Unit Testing	SA, TL-SF, TL-SP, D-SF																
System Testing	SA, TL-SF, TL-SP, D-SF																
Performance/Load Testing	SA, TL-SF, TL-SP, D-SF																
System Integration Testing	SA, TL-SF, TL-SP, D-SF																
Bug/Fixes Remediation	SA, TL-SF, TL-SP, D-SF																
User Acceptance Testing (UAT)	SA, TL-SF, TL-SP, D-SF																
Bug/Fixes Remediation	SA, TL-SF, TL-SP, D-SF																
<b>Training</b>																	
Training Prep	PM, FA, TL-SF																
Training Execution	PM, FA, TL-SF																
<b>Deployment</b>	SA, TL-SF, TL-SP																

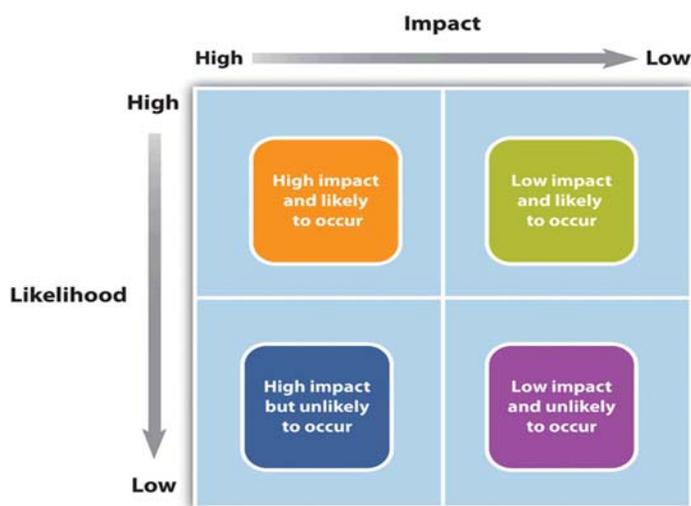
PM – Project Manager  
 SA – Solution Architect  
 FA – Functional Analyst  
 D-SF – Salesforce Developer  
 D-SP – SharePoint Developer  
 TL – SP – Technical Lead  
 SharePoint  
 TL – SF – Technical Lead  
 Salesforce

### 3.0 RISK MANAGEMENT PLAN

#### 3.1 Risk Management Framework

Team Sense Corp will monitor and manage project risks during the DIR eProcurement Project using an iterative risk management approach consisting of the following risk management practices:

- **Identify:** Team Sense Corp will generate a comprehensive list of risks based on events that might enhance, prevent, degrade, or delay the achievement of project objectives. This is initially completed during the inception of the project with client stakeholder engagement and input, and regularly updated going forward for the entirety of the project.
- **Assess & Analyze:** The Project Team will consider the causes and sources of potential risks, their positive and negative consequences, and the probability of occurrence. Using an assessment instrument, risks are then quantitatively categorized and prioritized for monitoring.
- **Respond & Plan:** Once risks are identified and prioritized, the Project Team will take specific proactive mitigation actions for these risks are discussed, planned, and implemented.
- **Monitor & Control:** The Project Manager will then monitor risk responses via a control mechanism such as a risk register or risk log. This step encompasses all aspects of the aforementioned risk management processes to:
  - Detect changes in the external and internal environment including changes to the risk itself
  - Ensure that the risk controls and mitigation activities are effective in both design and operation



### 3.2 Risk Analysis

Team Sense Corp will proactively analyze and monitor the following potential risk factors which are common to technology solution implementation and application development projects:

#### 3.2.1 Potential Risk Factors – Technology Solution Implementation Projects

Categories For Opportunities		Examples
<i>External</i>	<b>Economic</b>	Financial markets, unemployment, competition, mergers and acquisitions
	<b>Political</b>	Impact of loss of service to citizens, possible exposure and liability to state / county government
	<b>Legal</b>	Laws and/or policies by governmental bodies that constrain or impact the project
<i>Internal</i>	<b>Financial</b>	Cost overruns, budget constraints, funding issues
	<b>Resource</b>	Availability of people and facilities, attrition, skills limitation, clarity on roles and responsibilities, team cohesiveness, rules between competing firms
	<b>Schedule</b>	Completion date slippage, target date constraints, scope creep
	<b>Technical</b>	Failure to meet performance requirements, new or untested technologies, hardware malfunction, inadequate battery life, data integrity, data or system availability or access
	<b>Management</b>	Inexperienced project manager, project complexity, sponsor engagement, clarity of project plan, documentation of requirements
	<b>Communication</b>	Failure to satisfy user requirements / expectations; weak or limited change management
	<b>Operational</b>	Failure to meet usability, trainability, and/or maintainability requirements
	<b>Organizational</b>	Alignment to strategic goals / vision, tedious or slow procurement process, “red taps” approvals

3.2.2 Potential Risk Factors – Application Development Projects

Key Risk Area	Proactive Mitigation
Aligning project team and client expectations on delivery scope	Implement effective and timely communications on scope definition by ensuring client stakeholder engagement on: <ul style="list-style-type: none"> <li>• Weekly Status Meetings</li> <li>• Use Case Mapping Document</li> <li>• Functional Requirements Document</li> <li>• Detailed UI / Screen Mockups</li> <li>• User Acceptance Plan</li> <li>• User Rollout and Communications</li> </ul>
Ensuring technical developers fully understand and accurately implement functional requirements	Regularly engage and update technical team members on outcomes of functional requirements gathering conversations to ensure they fully understand the context of functional requirements when technical design and implementation decisions are made.
Accommodating for unforeseen technical development delays	Organize build activities into multiple sprints using rapid application development sprints, allowing the ability to more flexibly adjust to unforeseen development challenges.
Effectively training and transitioning the solution	Include client stakeholders in efforts and transition planning activities early on in the project to maximize engagement and ensure the transition processes and artifacts meet client stakeholder expectations.

### 3.3 Tools and Practices

Sense Corp will develop a risk log in project planning, and monitor throughout the project. A sample Risk Log is provided below.

Id	Risk	Impact	Likelihood of Occurrence	Degree of Impact	Action Trigger	Responsibility	Response Plan (Mitigation Plan)
1	Rain on day of event	Low attendance Financial loss	M	H	Weather forecast two days before event	Joe	Reserve indoor space now Recruit extra volunteers Develop detailed plan
2	Road construction	Reduced attendance Reduced revenue	H	H	Highway department publishes construction schedule	Jane	Identify alternate route Have signs made Post signs along all routes Announce in news media

## **4.0 COMMUNICATION MANAGEMENT PLAN**

### **4.1 Communication Management Approach**

The Team Sense Corp Project Manager will take a proactive role in ensuring effective communications on the DIR eProcurement Application Development Project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

### **4.2 Team Sense Corp Methodology**

Team Sense Corp's project management methodology strongly emphasizes effective and timely communications to ensure all project stakeholders understand what's expected from them (e.g., contribution to scope definition) and what they should expect from the project (e.g., business process changes resulting from implementation of the solution) The following will be planned and executed via the project Communication Plan:

- Project start: Kick-off meeting and project initiation will communicate project objectives / timeline, roles / responsibilities expectations, and scope definition
- Project status: Project status reports and meetings and written project status reports for the project team, sponsors, and steering committee will be leveraged to provide updates on progress, manage delivery expectations, and escalate / resolve critical issues

### **4.3 Stakeholder Communication Requirements**

As part of identifying all project stakeholders, the Team Sense Corp project manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be documented and maintained by the project manager. Standard project communications will occur in accordance with the Communication Matrix; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for the DIR eProcurement Application Development Project.

In addition to identifying communication preferences, stakeholder communication requirements must identify the communication channels for the DIR eProcurement Application Development Project and ensure that stakeholders have access to these channels. If project information is communicated via secure means or through internal company resources, all stakeholders, internal and external, must have the necessary access to receive project communications.

#### 4.4 Communication Methods and Technologies

The project team will determine, in accordance with DIR organizational policy, the communication methods and technologies based on several factors to include: stakeholder communication requirements, available technologies (internal and external), and organizational policies and standards.

#### 4.5 Communications Matrix

The following methods will be used to keep stakeholders informed and involved in the DIR eProcurement Project:

Group	Communication Content / Method	Minimum Frequency / Timing
<b>Project Team / Stakeholders</b>	Project Status Report / Meeting	Weekly
<b>Project Sponsors</b>	Project Status Report / Meeting	Bi-weekly
<b>Project Steering Committee</b>	Project Status Report / Meeting	Monthly
<b>Project Management Team</b>	Project Plan Updates Risk and Issue Log Updates	Weekly / As Needed
<b>End Users</b>	Notice of project changes, timeline, impact, and transition resources via email or in-person meeting	<ul style="list-style-type: none"> <li>• Project start</li> <li>• Four weeks before UAT</li> <li>• Four weeks before application rollout</li> <li>• During UAT / user training</li> </ul>
<b>External Stakeholders</b>	Email / meetings	As needed

## 5.0 QUALITY MANAGEMENT PLAN

### 5.1 Quality Management Goals and Phases

The goals for quality management of the DIR eProcurement Project are to assure:

- Project deliverables meet their stated requirements.
- Project management processes are appropriately followed.

Quality management is performed throughout the project lifecycle with special attention to:

1. Quality Planning – primarily during the project planning process.
2. Quality Assurance (QA) – primarily during the project execution process.
3. Quality Control (QC) – primarily during the project monitoring and controlling process.

### 5.2 Quality Planning

#### 5.2.1 Objectives

- Defines who is responsible for what, and document compliance
- Determines quality policies and procedures relevant to the project for both project deliverables and project processes

#### 5.2.2 Quality Planning Processes

- To begin with, Team Sense Corp carefully staffs our project teams for optimal performance, including resources responsible for ensuring quality control
- The Team Sense Corp Chief Delivery Officer is involved with every project to ensure the team has the necessary skills and resources to accomplish the project work
- The Team Sense Corp Engagement Manager is involved with the project throughout the duration of the effort and is responsible for managing project risk and the overall delivery of a quality work product

## 5.3 Quality Assurance

### 5.3.1 Objectives

- The focus of quality assurance is on the processes used in the project. Quality assurance ensures that project processes are used effectively to produce quality project deliverables. It involves following and meeting standards, continuously improving project work, and correcting project defects.

### 5.3.2 Quality Assurance Practices

- Team Sense Corp has established the following procedures to measure and report quality performance on each project:
  - Statement of Work
  - Kickoff Meeting
  - Risk Mitigation Plan
  - Project Status Reports
  - Project Executive Steering Committee Updates
  - Project Quality Assurance Review
  - Project Closeout
  
- Team Sense Corp will work with the appropriate DIR personnel to review items that could impact the delivery date and cost and determine contingency strategies. The risk mitigation items include:
  - Scope of Work - any change to scope will be escalated for review in the status meetings.
  - Project Plan - a plan will be established and a change to plan will be escalated for review.
  - Resource Throughput - quantity and quality of work product will be evaluated constantly
  - Review of Deliverables - deliverable template walkthrough & acceptance prior to final delivery
  - Availability of Resources - contingency for unexpected loss of resources.
  
- Develop Formal Quality Assurance Plan
  - Team Sense Corp will create a formal quality plan for each project that will document and communicate the various deliverable checkpoints, internal audits, and reviews that are planned to capture timely feedback. A cadence will be set in order to minimize rework and incorporate feedback.

## 5.4 Quality Control

### 5.4.1 Objectives

- The focus of quality control is on the deliverables of the project. Quality control monitors project deliverables to verify that the deliverables are of acceptable quality and the customer is satisfied.

### 5.4.2 Quality Control Practices

- Team Sense Corp will perform quality assurance audits on the DIR eProcurement Project to ensure that all applicable policies, procedures and best practices have been followed.
  - A series of concise interviews are performed with project staff, managers, and sponsors as appropriate. The findings of this process are then documented in the Quality Assurance Summary.
  - At least one formal quality assurance review by a Senior Team Sense Corp partner will be performed during the course of the DIR eProcurement Project.

## 6.0 CHANGE MANAGEMENT PLAN

### 6.1 Change Management Approach

The Change Management approach for the DIR eProcurement Project is designed so that all proposed changes are defined, reviewed, and agreed upon so they can be properly implemented and communicated to all stakeholders. This approach will also ensure that only changes within the scope of this project are approved and implemented.

The Change Management approach is not to be confused with the Change Management Process which will be detailed later in this plan. The Change Management approach consists of three areas:

- Ensure changes are within scope and beneficial to the project
- Determine how the change will be implemented
- Manage the change as it is implemented

The Change Management process has been designed to make sure this approach is followed for all changes.

### 6.2 Change Definitions

There are several types of changes which may be requested and considered for the DIR eProcurement Project. Depending on the extent and type of proposed changes, changes project documentation and the communication of these changes will be required to include any approved changes into the project plan and ensure all stakeholders are notified. Types of changes include:

- **Scheduling Changes:** changes which will impact the approved project schedule. These changes may require fast tracking, crashing, or re-baselining the schedule depending on the significance of the impact.
- **Budget Changes:** changes which will impact the approved project budget. These changes may require requesting additional funding, releasing funding which would no longer be required, or adding to project or management reserves. May require changes to the cost baseline.
- **Scope Changes:** changes which are necessary and impact the project's scope which may be the result of unforeseen requirements which were not initially planned for. These changes may also impact budget and schedule. These changes may require revision to WBS, project scope statement, and other project documentation as necessary.

The Team Sense Corp project manager will ensure that any approved changes are communicated to the project stakeholders. Additionally, as changes are approved, the project manager will ensure that the changes are captured in the project documentation where necessary. These document updates will then be communicated to the project team and stakeholders as well.

## 7.0 TRAINING PLAN

### 7.1 Learning Objectives

The learning objectives for the DIR eProcurement Project Training are as follows:

- Program Administrator Training
  - Daily operations and maintenance of the software
  - User administrative duties (e.g. add users, delete users, password administration)
  - System configuration
  - Monitoring system availability and system status
  - System error diagnostics
  - System performance monitoring
  - Administrative system reports
- Contract Manager Training:
  - Understanding of each system module and the associated business process
    - Creation of a solicitation
    - Routing of approvals
    - Posting and receipt by vendor
    - Compliance review and evaluation stages/processes
- Certified Training Program
  - Skills required to teach others DIR personnel on the use of the system
    - Advanced user techniques
    - Basic technical troubleshooting skills
    - Server side support

### 7.2 Instructional Methods

#### 7.2.1 Program Administrator Training

Team Sense Corp will provide one classroom based session and two “one-on-one” sessions with DIR personnel.

### 7.2.2 Contract Manager Training

Team Sense Corp will provide up to two classroom based sessions and two “one-on-one” sessions with DIR personnel.

### 7.2.3 Certified Training Program

Team Sense Corp will provide one classroom based session and two “one-on-one” sessions with DIR personnel.

## **7.3 Training Resources**

### 7.3.1 Facilities

All training will be occur at DIR facilities in Texas.

### 7.3.2 Training Materials

Team Sense Corp will provide the following training materials:

- Curricula and associated User Guides
- Online training materials

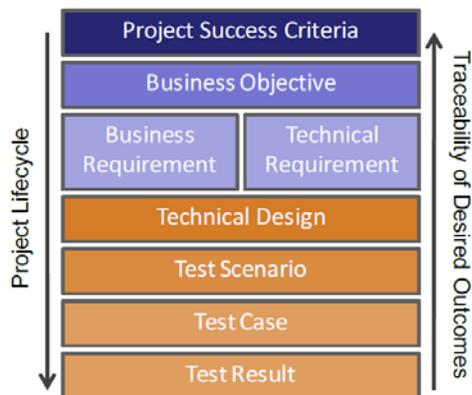
## 8.0 TESTING PLAN

### 8.1 Testing Approach

Team Sense Corp focuses on the details. We understand that regardless how elegant a solution, if the product is not accurate, it provides zero value. Our comprehensive testing methodology places an extreme emphasis on ensuring the overall integrity of the solution from an accuracy, performance, and experience perspective. Team Sense Corp project management will ensure the project plan includes an adequate amount of time for all phases of system verification, validation and testing as follows.

### 8.2 Testing Methodology

Team Sense Corp will employ a requirements-based testing approach to satisfy the testing requirements in the SOW. Requirements-based testing is performed to validate that each of the specific functional requirements have been designed and implemented in the final solution. Test cases are derived from functional requirements and focus on the system as a whole rather than inputs and outputs of individual components. Focusing on requirements allows the Testing Team to establish a measurable goal of what should be tested and also have traceability to each requirement via the Requirements Traceability Matrix.

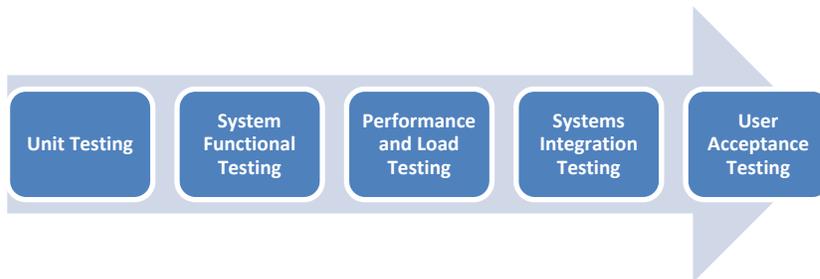


The Testing Team assumes that the system is developed based on business requirements established in the Functional Requirements Document. All changes to this deliverable should be communicated to the Testing Team by the document owner so that necessary adjustments to the test cases, test schedule, and project schedule can be assessed for impact and approval.

Detailed test cases will be written to identify the expected behavior of the application. Execution of the test cases and comparison of the actual results to the expected results will be used to determine the success or failure of the test. Both positive and negative scenario tests will be completed.

### 8.3 Testing Phases

The testing phases depicted in the diagram are described in detail below.



#### 8.3.1 Unit Testing

Unit testing is the process of testing individual solution components (sub-programs, sub routines, procedures) with the purpose of identifying differences between the code and the design specifications. Unit testing should include all code paths, internal logic, exception conditions, error handling, and compatibility with the supported platforms.

#### 8.3.2 System Testing

System Functional Testing validates that the solution features satisfy the documented requirements. The goal of this test is to ensure proper functionality, including security, usability, data entry, processing, and retrieval and batch processing functionality. This type of testing is based on black box techniques which include verifying the application (and its internal processes) by utilizing the application via the Reports and Dashboards and analyzing the output (results).

#### 8.3.3 Performance and Load Testing

Performance testing is done to ensure the solution meets its performance or efficiency objectives such as response time and throughput rates under projected workload and configuration conditions. Performance testing is based on the functionality added as specified in the Business Requirements Document (BRD) or System Design and Architecture Documentation (SDD).

#### 8.3.4 Systems Integration Testing

Integration Testing focuses on sets of unit-tested code that are combined into functional components that will be tested together. Integration testing occurs in a shared environment to ensure that the code integrates completely with the existing code base and system processing. Integration testing verifies the integration of all applications, including external and internal interfaces and the integration of applications with the hardware, software, and infrastructure in an as near production-like environment as possible.

### 8.3.5 User Acceptance Testing

UAT testing will have actual business users perform end-to-end testing to determine whether or not the system will meet the needs of the organization and the end user/customer. It validates that the system will work as intended by the user in the real world, and is based on real world business scenarios, not system requirements.

## **8.4 Testing Process**

### 8.4.1 Test Plans

A Test Plan will be created for the testing phase. **The Test Plan will incorporate the requirements specified in the SOW.** Each plan will include detailed descriptions of each testing phase, entry and exit criteria for each test phase, testing resources, resource training needs, testing schedule, testing procedures and documentation, and hardware and infrastructure requirements.

### 8.4.2 Test Design

The test case design process begins with a detailed review and analysis of the documented business requirements. The Testing Team provides feedback on the requirements to confirm they are a suitable level to create test cases. Once the requirements are well understood, the Test Team will form a testing strategy which will be documented in the Test Plan. The Test Plan will also capture detailed test cases and scripts used to execute the test cases, along with expected results. Prior to test execution, the Test Team will ensure the proper test data is in place and begin executing test cases and documenting results. These results will be shared with the project team. Defects will be prioritized and fixed as part of testing execution process.

### 8.4.3 Defect Tracking

Defect Tracking provides a means for tracking individual defect trends and status. Discrepancies will be entered into the defect-tracking tool as they occur. The Test Lead(s) will enter the information necessary to completely document the severity, nature, and description of each defect. The project team will meet and review open issues and confirm the priority for the resolution of the defect. Once a defect is resolved and a new build has been provided to the Testing Team, the defect will be reviewed/ regressed for validation and determine whether it is to be closed or remain open. Testing metrics will be recorded and reported to the project team on an agreed-upon basis.

#### 8.4.4 Test Environments

Three testing environments are normally utilized to support the testing effort.

- **Development (DEV):** The development environment will support any custom code development and will be used by the developers on the team.
- **Quality Assurance (QA):** The integration environment is where code is migrated after it has been unit tested. This environment will be utilized for functional testing, usability testing, and regression testing.
- **User Acceptance Testing (UAT):** The user acceptance environment is the final pre-production environment, and should most closely mirror production. UAT Testing and performance testing will take place in the UAT environment.

## 9.0 KNOWLEDGE TRANSFER PLAN

### 9.1 Knowledge Transfer Plan Approach

For clarification, the following terms are used throughout the document:

**Source Owner:** Team Sense Corp team member who is the owner of specific DIR eProcurement Project job responsibilities that will be projected for transition to a DIR appointed individual at the time of knowledge transfer upon direction from DIR.

**Target Owner:** DIR appointed individual who will accept ownership of specific DIR eProcurement Project job responsibilities from a Sense Corp member at the time of knowledge transfer upon direction from DIR.

- Phase 1 - Initiation and Planning

This phase will commence upon notification from DIR to initiate knowledge transfer. Sense Corp will start this process with these steps:

- Initiation and Planning
- Individual review of Roles and Responsibilities Matrix
- Transfer Initiation Meeting(s)
- Job Shadowing Planning
- Software and Hardware Inventory Review

- Phase 2 – Enablement

This phase consists of the actual transfer of knowledge and will be accomplished as follows:

- Role based Target Owner project document review
- Role based Job Shadowing
- Knowledge Transition Classroom Training sessions (minimum of two)

- Phase 3 – Cutover

This phase includes Sense Corp observation of Target Owners performing their newly assigned responsibilities to validate effective transition.

- Phase 4 - Support

This phase includes remote support to the Target Owners on an as-needed basis.

- Phase 5 – Completion

This phase includes final approval and acknowledgment of the completion of knowledge transfer.

## 9.2 Knowledge Transfer Plan Purpose

The Knowledge Transfer Plan will enable DIR to assume ownership of the DIR eProcurement Project responsibilities that are currently owned and managed by Team Sense Corp. The purpose of this deliverable is to provide transition of all roles and responsibilities in order to maintain the uninterrupted operation of the eProcurement Project. This will be accomplished through the following:

- Facilitation of initiation and planning meetings
- Identification and confirmation of roles and associated responsibilities to be transitioned
- Identification and confirmation of all project documentation
- Identification and confirmation of all hardware and software inventories
- Facilitation of training and knowledge transfer sessions
- Facilitation of job shadowing
- Completion of final review and sign-off

## 9.3 Knowledge Transfer Documents

This section outlines future documentation that will guide transition of operational activities of the eProcurement Project. References to documentation contained in this section may not be all-inclusive as new documents may be developed as required.

During the initial stages of planning, the list of documents identified in this section will be reviewed in its entirety to reflect the current documentation required to successfully support ongoing operational activities of the DIR eProcurement Project.

- Business/Functional Requirements Document
- Solution Design and Architecture Document
- Solution Architecture Diagrams
  - Data Architecture / Data Models
  - Application Logic / Workflow Designs
  - User Interface Designs
  - System Interface Designs and Implementation

- Exception Handling Design and Documentation
- Data Security Design and Implementation
- System Inventory
  - Software Inventory
  - Hardware Inventory
- Testing Documentation
  - Test Cases
  - Test Results
  - Testing documentation for future releases
- Training Materials
- Operational Documentation
  - Standard Operating Procedures
  - Deployment Manual
  - Release Process Documentation
  - Interface Listing and Specifications

## **SAMPLE DOCUMENTATION**

### **SAMPLE PROJECT PLAN**



DIR Marketplace  
Project Plan - Sampl

### **SAMPLE SYSTEM AND TECHNICAL DESIGN DOCUMENT**



DIR Website  
Technical Design Dc

## DELIVERY SCHEDULE AND VENDOR PRICING

No.	Item	SOW Paragraph	Proposed Level of Effort in Business Days	Proposed Start Date	Proposed End Date
1	<b>Project Preparatory Work</b>	4.1 Deliverable 1	10	9/5/2016	9/16/2016
2	<b>Suggestion Site</b>	4.1 Deliverable 2	Dev: 10	10/24/2016	11/04/2016
			Test: 45	01/16/2017	03/17/2017
3	<b>Solicitation Library</b>	4.1 Deliverable 3	Dev: 20	11/21/2016	12/16/2016
			Test: 45	01/16/2017	03/17/2017
4	<b>Contract Administration and Usage Tracking</b>	4.1 Deliverable 4	Dev: 10	01/02/2017	01/13/2017
			Test: 45	01/16/2017	03/17/2017
5	<b>Vendor Information Systems</b>	4.1 Deliverable 5	Dev: 10	10/24/2016	11/04/2016
			Test: 45	01/16/2017	03/17/2017
6	<b>Solicitation Responses</b>	4.1 Deliverable 6	Dev: 10	11/07/2016	11/18/2016
			Test: 45	01/16/2017	03/17/2017
7	<b>Evaluation and Tabulation</b>	4.1 Deliverable 7	Dev: 20	11/07/2016	12/16/2016
			Test: 45	01/16/2017	03/17/2017
8	<b>Contract Award, Auditing and Reporting</b>	4.1 Deliverable 8	Dev: 50	10/24/2016	01/13/2017
			Test: 45	01/16/2017	03/17/2017
9	<b>Project Closeout and Post-Implementation Support</b>	4.1 Deliverable 9	TBD**	03/20/17	TBD**

\*\* Project Closeout and Post Implementation Support will be 90 days or determined with DIR during the final contract award process.

Deliverable No.	Deliverable Name	Deliverable Cost	8% Cost Set - Aside	Billable Cost at Sign-off
1	Project Preparatory Work	\$ 100,000	\$ 8,000	\$ 92,000
2	Suggestion Site	\$ 54,000	\$ 4,320	\$ 49,680
3	Solicitation Library	\$ 125,000	\$ 10,000	\$ 115,000
4	Contract Administration and Usage Tracking	\$ 125,000	\$ 10,000	\$ 115,000
5	Vendor Information Systems	\$ 125,000	\$ 10,000	\$ 115,000
6	Solicitation Responses	\$ 125,000	\$ 10,000	\$ 115,000
7	Evaluation and Tabulation	\$ 125,000	\$ 10,000	\$ 115,000
8	Contract Award, Auditing and Reporting	\$ 100,000	\$ 8,000	\$ 92,000
9	Project Closeout and Post-Implementation Support			\$ 70,320
<b>Contract Total Costs</b>				<b>\$ 879,000</b>

\*Please note that deliverable prices above reflect a significant discount on the hourly rates provided below.

\*\*If selected and based on the finalized project schedule, Team Sense Corp would like to negotiate interim deliverables for each component of the project work.

Role/Function	Hourly Rate
Program Manager (part-time)	\$ 165
Project Manager	\$ 155
Solution Architect	\$ 155
Functional Analyst	\$ 130
Tech Lead - SharePoint/.NET	\$ 135
Developer - SharePoint	\$ 120
Tech Lead - Salesforce	\$ 165
Developer - Salesforce	\$ 140

**Assumptions**

- The anticipated start date of services is September 6, 2016. If the project starts after that date, project activities will shift accordingly.
- Anticipated duration of base period of performance is approximately 29 weeks, concluding on March 24, 2017.
- Project stakeholders to be included in project kickoff meeting will be identified upon project initiation.
- The project schedule is inclusive of standard holidays in consideration of anticipated out-of-office of DIR personnel and stakeholders.
- DIR internal decision-making will be completed in a timely manner so as to not impede the progress of Sense Corp services during the term of the project. This response assumes a 3 business day deliverable review and turnaround time. Work on the upcoming planned deliverables will begin immediately after submitting current deliverable for approval (e.g. we will not wait to begin work on the next deliverable until after the current deliverable is approved).
- DIR will provide the necessary and timely participation from appropriate subject matter experts and stakeholders to support the proposed services.
- Access to DIR infrastructure, technologies, and systems available will be provided in a timely manner so as not to impact project timelines.
- Pricing is based on no more than ten interviews/sessions for the gathering of functional, technical, and reporting requirements which are planned within the first 2 weeks of the project.
- Comptroller application data elements (that we must interface with) will be documented in a timely manner so as not to impact project timelines.
- Training participants will be identified one month prior to the training preparation activities.
- A strong overall project sponsor or steering committee supports the effort.



**Texas Department of Information Resources**  
**eProcurement Application Development Project**

**BEST AND FINAL OFFER (BAFO)**

**DIR-SDD-2081**

**August 30, 2016**

The following items replace content in our original response and represent our Best and Final Offer (BAFO) for this solicitation.

#### 4.5 Communications Matrix

The following methods will be used to keep stakeholders informed and involved in the DIR eProcurement Project:

Group	Communication Content / Method	Minimum Frequency / Timing
Project Team / Stakeholders	Project Status Report / Meeting	Weekly
Project Sponsors	Project Status Report / Meeting	Weekly
Project Steering Committee	Project Status Report / Meeting	Monthly
Project Management Team	Project Plan Updates Risk and Issue Log Updates	Weekly / As Needed
End Users	Notice of project changes, timeline, impact, and transition resources via email or in-person meeting	<ul style="list-style-type: none"> <li>• Project start</li> <li>• Four weeks before UAT</li> <li>• Four weeks before application rollout</li> <li>• During UAT / user training</li> </ul>
External Stakeholders	Email / meetings	As needed

## DELIVERY SCHEDULE AND VENDOR PRICING

The following is a revised delivery schedule based on further discussion with DIR. This schedule will be finalized upon completion of the *Functional Requirements Gathering / Solution Architect Phase* based on mutual agreement between DIR and Sense Corp (within the first 6 weeks of project).

Every effort will be made to do incremental testing and functional demonstrations at each milestone throughout the lifecycle of the project. The goal is to iteratively deliver functionality and obtain feedback from users on each module earlier in the project. Sense Corp will work with DIR to organize the final project plan in a way that supports these objectives.

Item	SOW Paragraph	Proposed Level of Effort in Business Days	Proposed Start Date	Proposed End Date
<b>Project Preparatory Work</b>	4.1 Deliverable 1	25	9/5/2016	10/7/2016
<b>Suggestion Site</b>	4.1 Deliverable 2	Dev: 10	10/24/2016	11/4/2016
<b>Solicitation Library</b>	4.1 Deliverable 3	Dev: 20	10/24/2016	11/18/2016
<b>Vendor Information Systems</b>	4.1 Deliverable 5	Dev: 10	11/21/2016	12/3/2016
<b>Solicitation Responses</b>	4.1 Deliverable 6	Dev: 10	12/5/2016	12/16/2016
<b>Evaluation and Tabulation</b>	4.1 Deliverable 7	Dev: 20	11/7/2016	12/3/2016
<b>Contract Administration and Usage Tracking</b>	4.1 Deliverable 4	Dev: 10	1/2/2017	1/13/2017
<b>Contract Award, Auditing and Reporting</b>	4.1 Deliverable 8	Dev: 50	10/24/2016	1/13/2017
<b>Testing</b>		Test: 45	1/16/2017	3/17/2017

NOTE: Project Closeout and Post Implementation Support will be 60 days from production deployment.



The deliverables include the following assumptions and will be invoiced per the schedule below:

1. **Deliverable 1:** The total cost of \$100,000 will be invoiced upon signoff of the deliverable.
2. **Deliverables 2-8:**
  - a. Once Development is complete, 50% of the total deliverable cost will be invoiced.
  - b. Deliverables 6-8 include integration testing as outlined in the Sense Corp draft project plan.
  - c. Draft training material will included as part of the Interim Production Deployment milestone for each deliverable prior to acceptance and sign-off.
  - d. Once that deliverable is tested (UAT complete) and deployed to production, 42% of the total deliverable cost will be invoiced.
  - e. The final 8% of the deliverable will be set aside for the *Project Closeout and Post-Implementation Support* deliverable.
3. **Deliverable 9:**
  - a. This deliverable will include end-to-end system training, any remaining testing, and support.
  - b. The total set aside of \$62,000 will be invoiced upon final signoff and completion of the 60 day warranty period.

Deliverable No.	Deliverable Name	Total Deliverable Cost	Interim Deliverable Cost (due at Dev Complete) - 50% of Cost	Interim Deliverable Cost (due at Prod Deploy) - 42% of Cost	8% Cost Set -Aside Released on Final Signoff
1	Project Preparatory Work	\$ 100,000	N/A	N/A	N/A
2	Suggestion Site	\$ 50,000	\$ 25,000	\$ 21,000	\$ 4,000
3	Solicitation Library	\$ 125,000	\$ 62,500	\$ 52,500	\$ 10,000
4	Contract Administration and Usage Tracking	\$ 125,000	\$ 62,500	\$ 52,500	\$ 10,000
5	Vendor Information Systems	\$ 125,000	\$ 62,500	\$ 52,500	\$ 10,000
6	Solicitation Responses	\$ 125,000	\$ 62,500	\$ 52,500	\$ 10,000
7	Evaluation and Tabulation	\$ 125,000	\$ 62,500	\$ 52,500	\$ 10,000
8	Contract Award, Auditing and Reporting	\$ 100,000	\$ 50,000	\$ 42,000	\$ 8,000
9	Project Closeout and Post-Implementation Support				\$ 62,000
	<b>Contract Total Costs*</b>	<b>\$ 875,000</b>			



**\*Updated cost reflects \$4,000 reduction in Contract Total Costs from original response.**