

Pre-Proposal Conference

Pennsylvania WIC MIS/EBT Implementation
MIS Implementation Services

RFQ 6100034439

Issuing Officer: Janis Brown
Office of Administration,
Bureau of IT Procurement Services

August 18, 2015 @ 2:00 PM

- Housekeeping
- Introductions
- Bureau of Small Business Opportunities (BSBO)
- Project Background, Department of Health
- Proposal Requirements
- Master Information Technology Services Invitation to Qualify (IT ITQ) Contract 4400004480
- Questions Submitted
- Additional Questions

- **In the event of a fire drill:**
 - Exit the room to the rear, continue down the hall and exit through the stairwell. On the ground floor, exit the building and assemble near the flag poles.
- **Restrooms:**
 - Located outside of the room to the left.
- **Sign attendance register**
- **Provide business card**
- **Sign-in sheet will be posted to eMarketplace website**

Commonwealth Representatives:

- **Office for Information Technology:**
 - Janis Brown, Issuing Officer
- **Bureau Of Small Business Opportunities (BSBO)**
 - Gayle Nuppnau, Department of General Services, Procurement Liaison
- **Department of Health**
 - Emily Iem, Project Manager

Bureau of Small Business Opportunities (BSBO)

Gayle Nuppnau

DGS, Procurement Liaison

Bureau of Small Business Opportunities

Program designed to encourage participation of Small Diverse Businesses (SDB) in state contracting

- A Small Diverse Business is a DGS-verified minority-owned business, woman-owned business, veteran-owned business or service-disabled veteran-owned business.
- A small business is a business in the United States which is independently owned, not dominant in its field of operation, employs no more than 100 full-time or full-time equivalent employees, and earns less than \$7 million in gross annual revenues for building design, \$20 million in gross annual revenues for sales and services and \$25 million in gross annual revenues for those businesses in the information technology sales or service business.

Bureau of Small Business Opportunities

To receive credit for being a Small Diverse Business or for subcontracting with a Small Diverse Business (including purchasing supplies and/or services through a purchase agreement), a Contractor must include proof of Small Diverse Business qualification in the Small Diverse Business participation submittal of the proposal, as indicated in section II of the RFQ.

- Photocopy of its DGS issued certificate entitled “Notice of Small Business Self-Certification and Small Diverse Business Verification” indicating its diverse status
- Small Diverse Business(es) must be named including address and phone
- Letter of intent that specifies the type of goods or services the small diverse business will provide along with percentage of commitment
- **All** Contractors must include a numerical percentage which represents the total percentage of the work (as a percentage of the total cost in the Cost Submittal) to be performed by the Contractor and not by Subcontractors and suppliers
- **All** Contractors must include a numerical percentage which represents the total percentage of the total cost in the Cost Submittal that the Contractor commits to paying to Small Diverse Businesses (SDBs) as Subcontractors

Bureau of Small Business Opportunities

Verification Letter

NOTICE OF SMALL BUSINESS SELF-CERTIFICATION AND SMALL DIVERSE BUSINESS VERIFICATION



The Department is pleased to announce that

AGENCY GUEST ACCOUNT

has successfully completed the Pennsylvania Department of General Services' process for self-certification as a small business under the Commonwealth's Small Business Procurement Initiative as established by Executive Order No. 2011-09, and is verified as a Small Diverse Business with the following designation(s):

BUSINESS TYPE(s): Construction Contractor, Construction Supplier, Design, Procurement Services, Procurement Goods, Information Technology

CERTIFICATION NUMBER: 336949-2012-07-SB-MWBE

ISSUE DATE: 07/15/2012 EXPIRATION DATE: 07/16/2015

RECERTIFIED DATE: 7/16/2014

Shen Phillips, Secretary
Department of General Services
Commonwealth of Pennsylvania

Bureau of Small Business Opportunities (BSBO) Verification Letter

➤ Sample of the BSBO Verification Letter:

SMALL DIVERSE BUSINESS LETTER OF INTENT

[DATE]

[SDB Contact Name]
Title
SDB Company Name
Address
City, State, Zip]

Dear [SDB Contact Name]:

This letter serves as confirmation of the intent of [Offeror] to utilize [Small Diverse Business (SDB)] on RFP [RFP number and Title] issued by the [Commonwealth agency name].

If [Offeror] is the successful vendor, [SDB] shall provide [identify the specific work, goods or services the SDB will perform, and the specific timeframe during the term of the contract and any option/renewal periods when the work, goods or services will be performed or provided].

These services represent [identify fixed numerical percentage commitment] of the total cost in the [Offeror's] cost submittal for the initial term of the contract. Dependent on final negotiated contract pricing and actual contract usage or volume, it is expected that [SDB] will receive an estimated [identify associated estimated dollar value that the fixed percentage commitment represents] during the initial contract term.

[SDB] represents that it meets the small diverse business requirements set forth in the RFP and all required documentation has been provided to [Offeror] for its SDB submission.

We look forward to the opportunity to serve the [Commonwealth agency name] on this project. If you have any questions concerning our small diverse business commitment, please feel free to contact me at the number below.

Sincerely,

Acknowledged,

Offeror Name
Title
Company
Phone number

SDB Name
Title
Company
Phone number

Contact Information

Bureau of Small Business Opportunities (BSBO)

Ms. Gayle Nuppnau

Procurement Liaison

Telephone: (717) 346-8105

E-Mail: gnuppnau@pa.gov

PA WIC MIS/EBT Implementation Services

Pre-Proposal Conference

Speaking Points

Emily Iem,
Department of Health, Project Manager

PA WIC MIS EBT Implementation Services

Background

PA WIC contracts with 24 health and human service agencies across the Commonwealth for delivery of PA WIC services to the public. Each Local Agency is an independent Contractor responsible for specific geographical regions of the state. Local Agencies maintain and staff 112 permanent clinics, approximately 36 connected satellite clinics and approximately 132 disconnected satellite clinics in their areas. These clinics serve approximately 253,000 PA WIC Participants each month representing 170,000 PA WIC families. The clinics certify the participants, provide Nutrition Education, prescribe benefits, print and distribute benefit Food Instruments (FIs), also referred to as WIC checks.

Congress issued a mandate that all WIC state agencies must transition from paper FIs to EBT no later than October 1, 2020.

PA WIC MIS EBT Implementation Services

Approach

- PA WIC has elected to transfer an existing system, the Mountain Plains State Consortium (MPSC) Management Information System (MIS) in order to implement EBT
- PA WIC has chosen Smart Card, outsourced claims processing for the EBT implementation
- USDA FNS requires that all state agencies utilize an IV&V or QA vendor for MIS and EBT implementation projects
- PA WIC will utilize the DOH PMM and plans to use a modified waterfall approach for the MIS development efforts
- PA WIC performed an initial gap analysis to identify required changes

PA WIC MIS EBT Implementation Services

Objectives

- Perform planning, requirements, design, development, testing, and deployment of the MPSC MIS to meet PA WIC requirements
- Include configuration, development, and deployment of the MPSC MIS in the PA WIC environment with the migration to EBT benefits delivery
- Include maintenance and support
 - One Year Warranty Period
 - Production System Monitoring
 - Support Services
 - System Modification Support
 - Update PA-WIC System Manuals
 - Training
 - Knowledge Transfer and Transition
 - Outgoing Transition Plan
 - Reporting

PA WIC MIS EBT Implementation Services

Requirements

- Personnel – team to include Project Manager, technical resources, business analyst, training, rollout and support services
- Configuration Management Plan – draft must be included with the response and can be updated and submitted during the project planning phase
- Requirements Management Plan – incorporate DOH PMM templates and process into the project approach
- Change Management Plan – incorporate DOH PMM templates and process into the project approach
- IV&V Management Plans – participate in and adhere to IV&V plans and actions
- Training – includes a significant training effort with WIC Program Office staff, DOH BIT staff, Local Agencies, and Clinics
- Project Management – incorporate DOH PMM into approach
- Gap Analysis – use initial gap analysis as basis for requirements and design activities; must be validated
- Policies and Procedures – both PA and USDA FNS

PA WIC MIS EBT Implementation Services

Tasks

- Deliverable Matrix – identifies deliverables for the entire project and highlights responsibility of each major group within it
 - Planning deliverables
 - Three development cycles to provide functional software earlier and throughout project lifecycle
 - Requirements and updated gap analysis
 - Updated design documents (MPSC has existing documents)
 - Test scripts
 - Training materials and evaluation surveys
 - Operations manuals
 - Test results
 - Pilot and statewide implementation

PA WIC MIS EBT Implementation Services

Tasks

- Maintenance and Support
 - Warranty Period
 - Production System Monitoring
 - Tier II Support Services
 - System Modification Support
 - Updated WIC manuals
 - Knowledge Transfer
 - Transition Plan
 - Status and SLA Report – provides a monthly report that communicates system performance and reports on adherence to SLAs

- **Proposal is divided into three (3) parts:** The following three parts must be submitted in separate individual sealed envelopes: **(III-4. Evaluation Criteria)**
 - A. Technical Submittal = **50%** of total points
 - B. Cost Submittal = **30%** of total points
 - C. Small Diverse Business Submittal = **20%** of total points
- **Bonus Points:**
 - D. Domestic Workforce Utilization Certification (**Appendix I**)
The maximum bonus points available for this criterion is **3%**

- To minimize delays in proposal evaluation and to avoid rejection of your proposal, read the RFQ carefully and submit a complete proposal
- Follow as completely as possible the proposal format given in **Part II** of the RFQ; this will aid the evaluation process
 - When labeling your proposal response use the same format, using the lettered and numbered paragraphs of **Part IV**. If an answer is the same as indicated in a previous section, repeat the answer or identify and refer to the previous section.
- The evaluation will be based on what is submitted
- Provide as much detail as possible in response to all requirements in the RFQ

Proposal Requirements

- **Each Contractor must provide the following: (I-13. Proposals, pg. 7)**
 - Ten (**10**) paper copies of the Technical Submittal,
 - Two (**2**) paper copies of the Cost Submittal,
 - Two (**2**) paper copies of the Small Diverse Business Submittal,
 - Two (**2**) complete and exact copies of the entire proposal (Technical, Cost and Small Diverse Business (SDB) Submittals, along with all requested documents) on separate CD-ROMs or flash drives,
 - If redactions are necessary, submit one (1) electronic copy of a redacted version of the entire proposal, in a separate folder on the CD or Flash Drive submittal, reference **Part I, Section I-15. Proposal Contents C. Public Disclosure, (Appendix C to this RFQ).** (See **Trade Secret/Confidential Proprietary Information Notice**)

Proposal Requirements Continued

- Mandatory Responsiveness Requirements (Section III-1)
 - Timely received from the Contractor
 - Properly Signed by the Contractor

Proposal Requirements Continued

- **Additional Proposal Requirements**
 - **Proposal Cover Sheet, Appendix B** must be submitted with the Contractor's proposal. Insert the Proposal Cover Sheet in the Technical Proposal as the first page.
 - a. Proposal Cover Sheet must be completed and signed by an official representative who is authorized to bind the company to a contract. (**Section I-13, pg. 8**). Please ensure that the signatory's authority, if not apparent in statute, is substantiated by bylaw, resolution, or a letter from your organization's General Counsel. Any questions, please contact the Issuing Officer, Janis Brown RA-OITPurchases@state.pa.us.
 - b. If the Contractor fails to submit a completed and signed Proposal Cover Sheet, the Contractor's proposal may be considered non-responsive.

Proposal Requirements Continued

- The proposal must remain valid until a purchase order is issued as specified in **Section I-13** of the RFQ
- The proposal must consist of three (3) separately sealed submittals:
 - a. Technical Submittal
 - b. Cost Submittal
 - c. Small Diverse Business Submittal
- Submit proposals as outlined and referenced in **Part II Proposal Requirements**
- The total score for the technical submittal of the Contractor's proposal must be greater than or equal to 70% of the available technical points to advance. Reference the Technical Scoring Formula website link in **Section III-4**

Proposal Requirements Continued

- **Do not** include any cost information in your technical submittal. If your proposal includes cost information, it shall be deemed non-responsive
- **Do not include** any assumptions in the cost submittal. (**Appendix H, Cost Matrix**)
- Prime Contractors must be pre-qualified in the service category(ies) under the Commonwealth's IT Services ITQ Contract [4400004480](#) by the proposal opening/due date.
 - a. Reference pg. 2 of the proposal for the service category(ies) and more information regarding the IT ITQ Contract registration process
- Submit proposal on the basis of the IT ITQ Master Contract 4400004480 Terms and Conditions set out in [Part IV - Terms & Conditions](#)

- **ADDRESS PACKAGES PROPERLY**
- **INCLUDE:**
 - RFQ Number (6100034439)
 - Number Multiple Package
(i.e. 1 of 3, 2 of 3, etc.)
 - Must be Sealed
 - Allow time for delivery
 - Reference **Calendar of Events, pg. 4** for delivery and package address information
 - a. **Note:** All proposals must be received by the Commonwealth Mail Processing Center. If the proposals are delivered directly to 506 Finance Building, your proposal may be deemed non-responsive.

Calendar of Events

| | | |
|--|----------------|---|
| Answers to Potential Contractor questions posted to the DGS website (http://www.emarketplace.state.pa.us/Search.aspx), no later than this date. | Issuing Office | Wednesday, August 26, 2015 at 4:30 PM |
| Please monitor the DGS website for all communications regarding the RFQ. | Contractors | Ongoing |
| <p><u>Sealed proposal must be received by the Issuing Office at:</u></p> <p>(Janis Brown) Bureau of IT Procurement c/o Commonwealth Mail Processing Center 2 Technology Park (rear) Attn: IT Procurement, Finance Building, Room 506 Harrisburg, PA 17110</p> <p>NOTE: Proposal must be time and date stamped by the facility receiving the proposals. Proposal may only be hand-delivered to the address set forth in the Calendar of Events, between 6:15 a.m. and 2:15 p.m., Monday through Friday, excluding Commonwealth holidays.</p> | Contractors | Thursday, September 10, 2015 at 1:00 PM |
| Tentative schedule for oral presentations as set forth in Section I-22. The Issuing Office will notify Contractors selected to conduct oral presentations. | Contractors | TENTATIVE: Week of October 26, 2015 |

Proposal Delivery Address

Sealed proposal must be received on or before **Thursday, September 10, 2015** by **1:00 PM** to the Issuing Office at the following address:

**(Janis Brown), Bureau of IT Procurement
c/o Commonwealth Mail Processing Center
2 Technology Park (*rear*)
Harrisburg PA 17110
Attn: IT Procurement 506 Finance**

Note: Hand-delivered proposals must be delivered to **Commonwealth Mail Processing Center, 2 Technology Park (rear)**, and must be time and date stamped by the facility receiving the proposals. Ascertain you receive receipt stating date and time of delivery. Proposals may only be hand-delivered between **6:15 a.m. and 2:15 p.m.**, Monday through Friday, excluding Commonwealth holidays. The Issuing Office will not accept proposals that are hand delivered to 506 Finance Building.

IT Services ITQ Contract 4400004480

This is a restricted solicitation, only those Contractors qualified in the following service categories under the Commonwealth's Information Technology (IT) Services Invitation to Qualify (ITQ) Contract, [4400004480](#), prior to the bid opening date may respond.

- **Consulting Services – IT General**
- **Software Development Services**

Organizations interested in doing business with the Commonwealth through this contract **must first be registered as a Commonwealth Supplier**. For more information about registration, please view the [Registration Guide](#).

Once an organization is registered with the Commonwealth, they must develop and submit a bid along with all supporting documentation through the [PA Supplier Portal](#) website in order to qualify for the service category associated with this contract.

The Commonwealth will evaluate the bid along with all supporting documentation to determine whether the organization meets the minimum eligibility requirements. Suppliers must also complete and submit additional required documentation as specified in Part II – Bid Requirements for their proposal to be considered as being complete and responsive.

- **Starting the Qualification Process**

1. Log On to the [PA Supplier Portal](#), and then click on the Bidder tab.
2. Click on the Enterprise Applications navigation button on the left.
3. Click on the ITQ Proposal Administration link.
4. Click on the Proposal button.
5. Click on the drop down and select Create New.
6. Click View for the appropriate ITQ.
7. After you have reviewed Part I-IV scroll to the bottom of the page, then click on the Select this ITQ button.
8. Complete all required Steps and submit your proposal.

- **View Parts I – IV of the Master IT Services ITQ Contract 4400004480**

[Part I - Statement of Work](#)

[Part II - Bid Requirements](#)

[Part III - Open Enrollment Process](#)

[Part IV - Terms & Conditions](#)

For more information about the Commonwealth's Invitation to Qualify contracts and their policies, please visit the [ITQ Website](#)

ITQ Administrator Contact Information

Any questions pertaining to the Commonwealth's Information Technology (IT) Services Invitation to Qualify (ITQ) Contract, [4400004480](#) or to learn how to qualify for the ITQ, please feel free to contact:

Joseph M. Millovich

ITQ Administrator

Telephone: 717-214-3434

Email: jmillovich@pa.gov

Questions & Answers (Q&A)

- **Questions**

- All additional questions must be written on the Q&A sheets provided.
- **Any answers provided today, are considered unofficial and not binding. The Q&A final document will become official when posted to the DGS PA e-Marketplace website.**
- All Q&A will be posted to the DGS PA e-Marketplace website:
<http://www.emarketplace.state.pa.us>

- The Sign-in sheet, business cards, and this presentation will be posted to PA e-Marketplace website following this conference as an addendum to this RFQ.
- Posted Information - Link to view posted solicitation and addendums [emarketplace.state.pa.us/WIC IVV RFQ 6100034439](http://emarketplace.state.pa.us/WIC_IVV_RFQ_6100034439)
- MPSC Source Code – if you are in good standing as a Contractor on the IT ITQ and interested in downloading the source code, please contact info@wictechnologypartners.com. You are bound by the terms and conditions of the IT ITQ when receiving and reviewing the source code.

*Thank-you for attending today's
Pre-Proposal Conference*