

Pre-proposal Conference

Unified Communications & Voice Services

RFP#6100039274

December 19, 2016

Agenda

- Introductions
- Small Business Opportunities
- Telecom Strategy
- RFP Overview
- Proposal Requirements
- Calendar of Events

Introductions

Agency Representatives:

- PA Office for Administration
 - Joe Millovich, Issuing Officer
 - Kevin Paul, Director of Enterprise Services
- DGS, Bureau of Diversity, Inclusion and Small Business Opportunities
 - Audrey Smith, Procurement Liaison

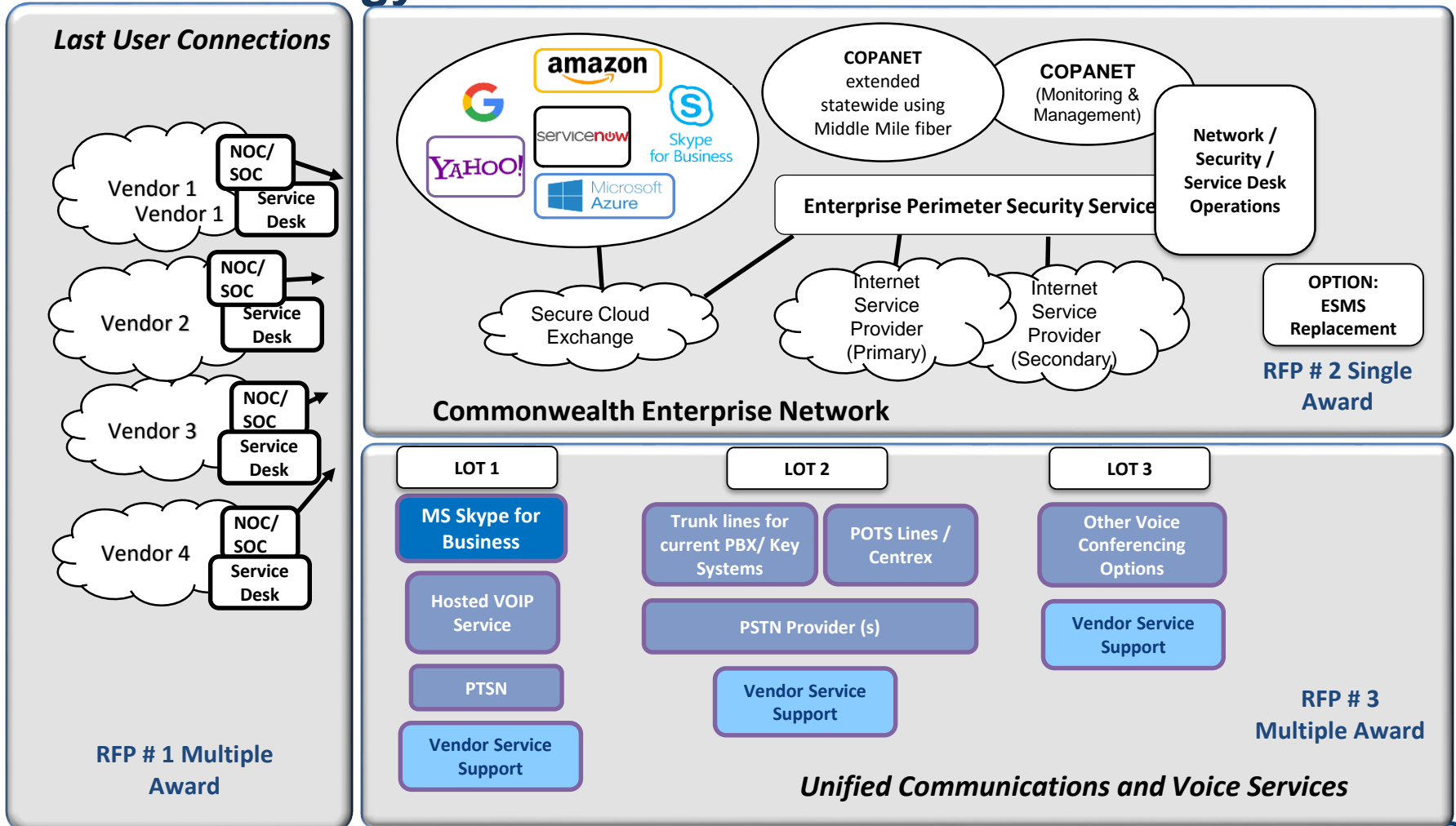
Telecom Strategy

TELECOM STRATEGY OBJECTIVES

- **Leverage Commonwealth Assets:** Leverage existing statewide network(s) and infrastructure assets where possible that drives connectivity to all 67 counties.
- **Emergency Response Interoperability:** Provide a secure, seamless alternate network path for connectivity among public safety and emergency management entities and county emergency operation centers, municipalities, schools, Institutions of Higher education, and other local resources in the event of primary network failures.
- **Marketplace:** The ability to expand the Market Place of last mile providers to include more diversity of providers and will include expanded opportunities for rural PA ILECs.
- **Economic Opportunity:** A common local and regional platform for further collaboration among other higher education institutions, schools, municipalities and economic development initiatives to expand access to jobs and training, support entrepreneurship and small business growth and strengthen community development efforts.
- **IT Cost Optimization:** Provide the commonwealth greater network capacity and performance, “Rightsizing” to align with business requirements and the need to support and enable innovation efforts across the agencies.
- **Performance:** Improve performance and operations through cloud computing, disaster recovery options, cybersecurity, secure authentication and online service delivery.

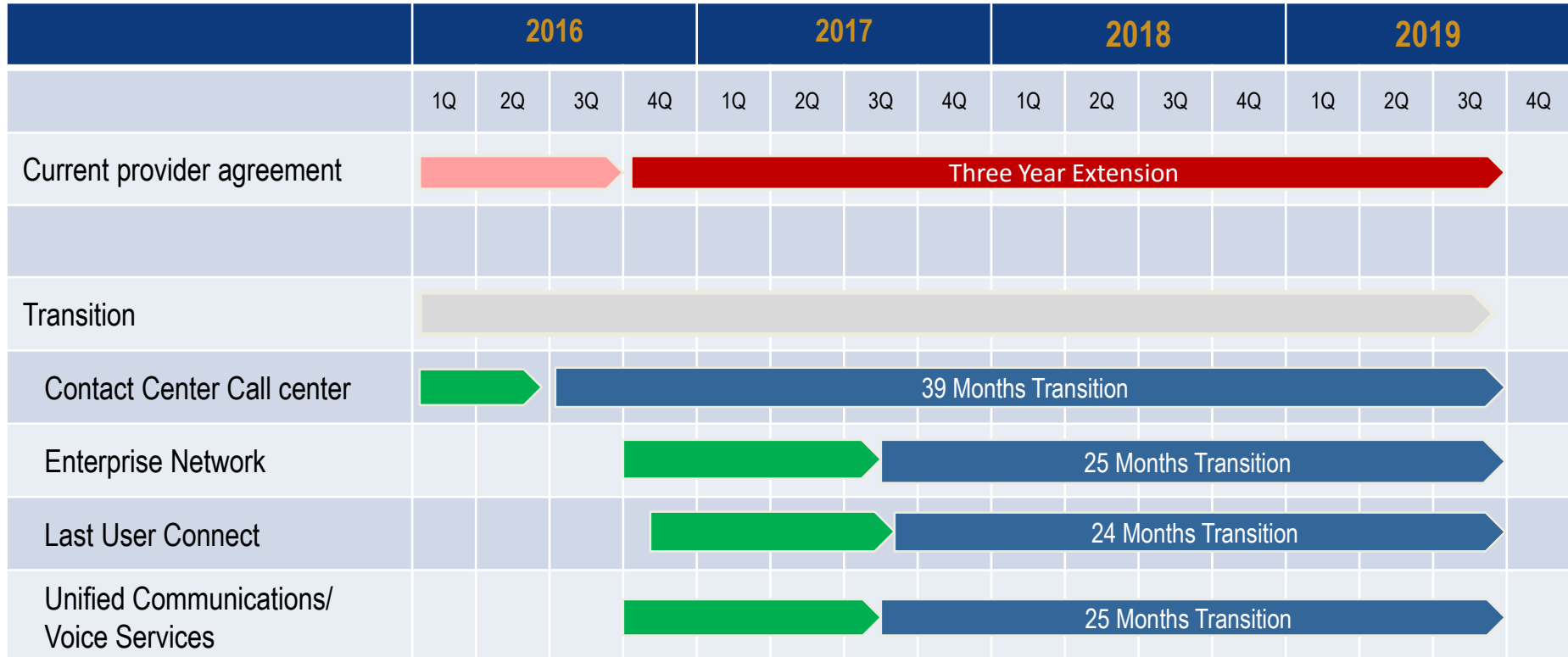
Telecom Strategy

Telecom Strategy



Telecom Strategy

Telecom Strategy Timeline



RFP Overview

- **RFP 6100039274 – Unified Communications and Voice Services (this RFP)** provides Unified Communications and Voice Services
 - Unified Communications and VoIP telephony services, as well as support for traditional voice services.
 - Provides an integrated Skype for Business and hosted VoIP platform that is federated with the Commonwealth's O365 and Skype for Business users.
 - Unified Messaging
 - Hosted VoIP service with PSTN connectivity. This includes voice mail, auto attendant, 911 services, call handling, conferencing, safety & security, hardware and main line services.
 - Conferencing to support PSTN to MS Skype for Business
 - Integration between VoIP and Skype for Business
 - User endpoint hardware (phones, soft phone devices, conference)
 - Toll free services
 - Trunk lines – for existing PBX and Key systems
 - POTS lines for emergency phones, equipment monitoring support, payphones, etc.
 - Centrex service and features (to include voice mail, auto attendant, 911 services, call handling, conferencing, safety and security, hardware and main line services)
 - Supplier's service desk service connected to the Enterprise Service Desk supplied by the RFP 2 Supplier.

Small Business Opportunities

Bureau of Diversity, Inclusion and Small Business Opportunities

Request for Proposal(RFP) : Format and Template

RFP Small Diverse (SDB) and Small Business(SB) Components:

Part I: General Information

- SDB/SB Eligibility and Program Information

Part II: Criteria For Selection

Part III: Technical Submittal

Part IV: Cost Submittal

Part V: Small Diverse And Small Business Participation Submittal

- Contractual obligations resulting from SDB/SB Submittal

Appendix : Small Diverse and Small Business Letter of Intent

Appendix : Small Diverse Business and Small Business Submittal

What do I need to know – Part I?

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

- 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.
- A Small Diverse Business is a DGS-verified minority-owned business, woman-owned business, veteran-owned business, service-disabled veteran-owned business, LGBT owned or disability-owned business enterprise.

What do I need to do –Part I?

- Consider subcontracting opportunities available for small diverse and small businesses
- Search the DGS database of SDBs and SBs and identify SDB/SB business partners for opportunities and inclusion
- Complete and submit two (2) SDB/SB Participation Submittal Forms in separately sealed envelope (1 original and 1 copy) and corresponding Letters of Intent

How do I find SDBs and SBs?

To search all DGS-verified SDBs and DGS-certified SBs, visit the DGS website at:

<https://www.dgs.internet.state.pa.us/SBPI/AlphaResults.aspx>

Small Business Certificate

NOTICE OF SMALL BUSINESS SELF-CERTIFICATION



The Department is pleased to announce that

TRAINING

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, with the following designation:

BUSINESS TYPE(s): Procurement Services, Information Technology

CERTIFICATION NUMBER: 123456-2014-03-SB

ISSUE DATE: 03/27/2014

EXPIRATION DATE: 03/27/2016

RECERTIFIED DATE: 3/21/2015

A handwritten signature in black ink, appearing to read "C. Topper", written over a horizontal line.

Curtis M. Topper, Acting Secretary
Department of General Services
Commonwealth of Pennsylvania

Title

Notice of Small Business
Certification

Certification Number

1. Vendor ID
2. Initial certification
Year/Month
3. Designation as Small
Business (SB)

Small Diverse Business Certificate

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



pennsylvania
DEPARTMENT OF GENERAL SERVICES

The Department is pleased to announce that

TRAINING

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): Procurement Services, Information Technology

CERTIFICATION NUMBER: 123456-2014-03-SB-WBE

ISSUE DATE: 03/27/2014

EXPIRATION DATE: 03/27/2016

RECERTIFIED DATE: 3/21/2015

Curtis M. Topper, Acting Secretary
Department of General Services
Commonwealth of Pennsylvania

Title

Notice of Small Business
Certification

AND

Small Diverse Business
Verification

Certification Number

1. Vendor ID
2. Initial certification
Year/Month
3. Designation as Small
Business (SB)

AND

Small Diverse Business

SDB / SB Participation Submittal

REVISED: March 2014

SMALL DIVERSE BUSINESS (SDB) AND SMALL BUSINESS (SB) PARTICIPATION SUBMITTAL

Project: [RFP NAME/DESCRIPTION HERE]

Proposer Firm: _____

PROPOSER INFORMATION:

In your firm a DGS-Verified Small Diverse Business? Yes No **QUEST** (check one)

(Proposer must include its "Notice of Small Business Self-Certification and Small Diverse Business Verification" indicating its diverse status to receive credit for proposing as a Small Diverse Business.)

In your firm a DGS-Self-Certified Small Business? Yes No **QUEST** (check one)

(Proposer must include its "Notice of Small Self-Certification" to receive credit for proposing as a Small Business.)

SUBCONTRACTING INFORMATION:

Percentage Commitment for SDB and SB Subcontracting Participation

After examination of the contract documents, which are made a part hereof as if fully set forth herein, the Proposer commits to the following percentages of the total contract value for Small Diverse Business and Small Business subcontracting participation.

Small Diverse Business Subcontracting annual percentage commitment:

_____ % _____ Percent
(Figure) (Written)

Small Business Subcontracting annual percentage commitment:

_____ % _____ Percent
(Figure) (Written)

Request for Proposal
Department of General Services

REVISED: March 2014

Listing SDB and SB Subcontractors

The proposer must list in the chart below potential SDBs and SBs that will be used to meet the percentage commitments provided above. Include the SDB/SB company name, designation of SDB or SB, SDB/SB Primary Contact Information, and the description service or supplies the SDB/SB will provide, percent of contract value committed, dollar value of total contract value committed, and an indication as to the Proposer's intent to utilize the SDB/SB subcontractor for contract options or renewals. Include as many pages as necessary. **Offers must also include a Letter of Intent as indicated in RFP Section II-9 for each SDB/SB listed.**

SDB/SB Name	SDB or SB	Primary Contact Name & Email	Description of Services or Supplies to be provided	% of total Contract Value Committed	Estimated \$ value of Commitment	Will SDB/SB be used for options/renewal? (yes/no)

Request for Proposal
Department of General Services

SDB / SB Letter of Intent

APPENDIX N

SMALL DIVERSE AND SMALL BUSINESS LETTER OF INTENT

[DATE]

[SDB/SB Contact Name]

Title

SDB/SB Company Name

Address

City, State, Zip

Dear [SDB / SB Contact Name]:

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

If [Offeror] is the successful vendor, [SDB or SB] shall provide [identify the specific work, goods or services the SDB/SB 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 or SB] will receive an estimated [identify associated estimated dollar value that the fixed percentage commitment represents] during the initial contract term.

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

Title

Company

Phone number

What do I need to know – Part II?

Raw score will be calculated by crediting commitments to SDBs at 67% of total available points and adding commitments to SBs at 33% of total available points.

$$\begin{aligned} \text{SDB/SB Raw Score} &= \\ \text{TOTAL POINTS} & (2/3 \times \text{SDB}\% + 1/3 \times \text{SB}\% + 1/3 \times \text{SDB}\%) \\ \text{Simplified to:} & 200 (\text{SDB}\% + (\text{SB}\% \times 1/3)) \end{aligned}$$

- SDBs are already qualified as a SBs, therefore SDB Proposers are eligible to receive 100% of the SDB/SB points
- Proposers who indicate subcontracting commitments to SDB/SBs will be credited in accordance with percentages proposed
- Proposer submitting the highest scoring SDB/SB Participation Submittal will receive all available points, with other Proposers' raw scores adjusted pro rata

How is the SDB/SB Submittal Scored?

- Scoring Examples:

Scenario	Score
<u>Proposer 1:</u> SDB Prime • 100% SDB Score = $200(1 + (1/3 \times 0))$	200 points
<u>Proposer 2:</u> SB Prime, with SDB Commitment • 100% SB; 15% SDB Commitment Score = $200(.15 + (1/3 \times 1))$	96.67 points
<u>Proposer 3:</u> Non-SDB/SB Prime, with SDB/SB Commitments • 15% SDB Commitment; 10% SB Commitment • Score = $200(.15 + (1/3 \times .10))$	36.67 points

What do I need to know – Part V?

- Contract commitments made to SDBs/SBs become contractual obligations upon contract execution
- Selected Proposer must submit a final, executed subcontract for each SDB/SB named within 30 days of contract execution
 - SDB/SB subcontractors must perform 50% of the work subcontracted to them
 - If subcontract cannot be achieved, Selected Proposer must notify BDISBO
- Individual percent commitments cannot be altered without written approval from BDISBO
- All SDB/SB commitments must be maintained if the contract is assigned to another prime contractor.
- Selected Proposer must complete quarterly utilization reporting, tracking progress in meeting commitments
- Selected Proposer must contact BDISBO if circumstances arise that may affect the ability to comply with contract commitments

What's New?

- Consideration for and inclusion of Small Businesses as prime contractors and subcontractors in addition to Small Diverse Businesses in scoring
- Simple, consistent template form for SDB/SB submittal supported by executed Letters of Intent
- DGS issued SDB/SB certificate not required with submittal

Contact Information

- Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)
 - Telephone: (717) 783-3119
 - Audrey Smith, Procurement Liaison
 - E-Mail: AudreSmith@pa.gov
 -
- Curtis Burwell, Procurement Compliance
 - E-Mail: Cburwell@pa.gov

Proposal Requirements

Mandatory Responsiveness Requirements. To be eligible for selection, a proposal must be:

- Timely received from an Offeror
- Properly Signed by the Offeror
 - The proposal must be signed by an official representative which is able to bind the company to a contract.

Proposal Requirements

- To minimize delays in evaluation and to avoid rejection of your proposal, read the RFP carefully.
- Provide as much detail as possible in response to all requirements.
- Evaluation is be based **only** on what is submitted within a proposal.

Proposal Requirements

Proposals are divided into three parts that must be submitted in separate individually sealed envelopes:

- **Technical Submittal = 50%**
 - Bonus Points: Domestic Workforce (Appendix B) = **3%**
- **Cost Submittal = 30%**
- **Small Diverse Business Submittal = 20%**

Proposal Requirements

Each Offeror must provide the following:

- Thirty (**30**) paper copies of the Technical Submittal.
 - Mark one (**1**) as the original version
- One (**1**) paper copy of the Cost Submittal.
- Two (**2**) paper copies of the Small Diverse Business and Small Business Participation Submittal and related letters of Intent.
- One (**1**) complete and exact copy of the entire proposal on CD-ROM or Flash drive in Microsoft Office or compatible format.

Calendar of Events

Activity	Responsibility	Date
Deadline to submit Questions via email to: RA-OITPurchases@state.pa.us with the subject line: "RFP 6100039274 Question"	Potential Offerors	December 19, 2016
Pre-proposal Conference: Commonwealth Technology Center 1 Technology Park, Conference Room 1 & 2 Harrisburg, PA 17110	Issuing Office/Potential Offerors	December 19, 2016 9:00 a.m.
Answers to Potential Offeror questions posted to the DGS website at: http://www.emarketplace.state.pa.us/Search.aspx no later than this date.	Issuing Office	December 21, 2016
Please monitor website for all communications regarding the RFP.	Potential Offerors	On-going
Sealed proposal must be received by the Issuing Office at: Attn: Joseph M. Millovich Bureau of IT Procurement c/o Commonwealth Mail Processing Center 2 Technology Park (rear) Attn: IT Procurement, 506 Finance Building Harrisburg, PA 17110 Proposals must be time and date stamped by the facility receiving the proposal. Proposals may only be hand delivered between 6:15 a.m. and 2:15 p.m., Monday through Friday, excluding Commonwealth holidays	Offerors	February 23, 2017 1:00 p.m.

**Thank you for attending
the Pre-proposal
Conference**