“Get to Know You” Bidders Conference

Employer Reporting Application Project

Request for Proposals

RFP 13-002-103

Link to WebEx Recording
Agenda

• Introductions
• Purpose of Conference
• Ground Rules
• About DRS
• Project Scope
• Highlights from the RFP
• RFP Package
• Procurement Timeline
• Mandatory Bidders Conference
• Procurement Process
• Questions

Please see RFP for complete details.
Purpose of Conference

• Provide information about DRS

• Provide information about the procurement process
  – Multiple staged process

• Important Note:
  – Nothing said or discussed during this conference will modify, add to, alter or in any other way qualify or amend what is currently contained in the procurement documents.

  – If, as a result of this conference, DRS recognizes a need to add to or amend the procurement documents, such addendum or amendment will be posted in writing on WEBS and the DRS website.

Please see RFP for complete details.
Ground Rules

• Presentation will be followed by Q&A
• Please hold questions until the end, WebEx will be muted until Q&A
• Ask questions about DRS or the procurement process
  – Questions related to other topics will be addressed at the Mandatory Bidders Conference, Sept. 20, 2013
• Verbal responses to questions are unofficial
• Reminder, mute your phones unless asking a question
• Attendance today does not provide any advantage to Bidders
• This session is being recorded

Please see RFP for complete details.
About DRS

• Administers 8 Pension Systems that include 15 Pension Plans
• Administers Deferred Compensation Plan
• Administers Old Age Survivor’s Insurance Program (OASI)
• 1,300+ Employers report service credit and compensation
• Employers report each pay period by various means
  – Secure file transfer, automated dataset upload, web application, manually entered from a paper report
  – Employers may make corrections several times each month

Please see RFP for complete details.
About DRS

- Agency size, approximately 226 employees
- Located in one building
- Mainframe system technologies include Natural, Cobol, Adabas
- Web technologies include C#.Net, MS SQL
- Middleware technologies include IBM Websphere MQ, SAG EntireX
- Lease services from Consolidated Technology Services (CTS)

Please see RFP for complete details.
Project Scope

- BPMS Solution – the software
- ERA Project – installation, training, build

Please see RFP for complete details.
Highlights from the RFP

• A BPMS Solution that meets DRS’ requirements
• Installation of the BPMS Solution
• Training of Project Team on BPMS Solution
• An Experienced Vendor to guide us through development of ERA using the BPMS solution
• Guidance on Organizational Change Management
• DRS becomes self-sufficient and builds future processes without Vendor help
• A BPMS Solution that supports other critical processes
• A Long-Term Partnership

Please see RFP for complete details.
RFP Package

Includes, but not limited to:
- Statement of Work
- Joint Resource Plan
- Project Schedule

Please see RFP for complete details.
Procurement Timeline

Stage 1: Evaluation of Minimum Qualifications
- 10/8/13 - 10/15/13

Stage 2: Evaluation of Requirements/Cost Proposals
- 10/15/13 - 11/8/13

Stage 3: Demos and Interviews
- 11/8/13 - 12/12/13

Stage 4: IPS Workshops/Contract Negotiations
- 12/17/13 - 4/1/14

- RFP Published
  - 8/28/13

- Bidders Conference
  - 9/20/13

- Proposals Due
  - 10/4/13

- Evaluation of Requirements/Cost Proposals
  - 10/15/13 - 11/8/13

- Finalist Bidder(s) Sign Agreement
  - 4/1/14

- Announce Apparent Successful Bidder
  - 4/11/14

- Contract Begins
  - 4/28/14

Please see RFP for complete details.
Mandatory Bidders Conference

• Sept. 20, 2013, 1:30 p.m. Pacific Time
• At least one representative must attend in-person, maximum 3 in-person
• Bidders must register in advance
• Onsite at DRS facility
• Preparer of Cost Proposal must attend
• May have remote attendees in addition to onsite attendee(s)
• List of Companies attending will be published
• Verbal Responses to questions are unofficial
• Official responses will be posted as RFP addenda

Please see RFP for complete details.
Procurement Process

- Submit Proposal – Oct. 4, 2013 3:00 p.m. Pacific Time
  - 4 printed copies, one with original signatures
  - 4 electronic copies (CD or USB memory sticks)
  - Delivered together to DRS office

Please see RFP for complete details.
Procurement Process - Stage 1

- Evaluation Stage 1: Minimum Qualifications and Bidder Requirements
  - Complete proposal: Attachment A, Proposal Checklist
  - Attachment C, Section C.2, Minimum Qualifications (Mandatory)

- Partial list of Minimum Qualifications:
  - Bidder is owner of the software
  - BPMS Solution as defined in the RFP
  - Solution runs in Windows Environment

- Evaluation begins Oct. 8, 2013
- Notification to Bidders Oct. 15, 2013

Please see RFP for complete details.
Procurement Process – Stage 2

- Stage 2: Business and Technical Requirements, Issues List, Price Proposal
  - Anticipate between 2 - 4 Bidders advance to Stage 3
  - Evaluation begins Oct. 15, 2013
  - Notification to Bidders Nov. 8, 2013

Please see RFP for complete details.
Procurement Process – Stage 3

• Stage 3: Demonstration, Oral Interview, and Reference Checks
  - Demonstration Materials will be provided
  - Onsite at DRS facility
  - Preparer of Cost Proposal must attend
  - Maximum 3 attendees in person
  - May have remote attendees in addition to onsite attendee(s)
  - Anticipate 1 or 2 Bidders advance to Stage 4
  - Demo / Interviews week of Dec. 2, 2013
  - Notification to Bidders Dec. 12, 2013

Please see RFP for complete details.
Procurement Process – Stage 4

• Stage 4: Implementation Planning Study Workshop (IPS) / Contract Negotiations
  – IPS will include finalization of project documents, such as:
    • Statement of Work
    • Resource Plan
    • Project Schedule

Please see RFP for complete details.
Procurement Process

- Announce Apparent Successful Bidder April 11, 2013
- Award Contract

Please see RFP for complete details.
Questions?

- Limit questions to DRS or the procurement process
- Verbal responses to questions are unofficial
  - When asking a question please state your name and the company you represent.
- RFP Coordinator – Jilene Siegel
  - Telephone: (360) 664-7291
  - Email: jilenes@drs.wa.gov
- For Notifications:
  - Contact RFP coordinator to be added to distribution list or;
  - Register in WEBS for commodity codes 209-46 or 920-39 and availability to work in Thurston County.

Please see RFP for complete details.