

RFP 16-01 Bidders Conference

Employer Reporting Application Project

August 11, 2015 9:00 – 11:00 AM PT



Agenda

- Introductions
- Conference Overview
- Opening Remarks
- About DRS/Employers
- Project Goals
- Project Scope/Timeline
- Procurement
- Questions and Answers

Introductions

Department of Retirement Systems Participants

Jilene Siegel, Rule & Contracts Manager, RFP Coordinator

Shawn Merchant, Assistant Director for Project Management Division, Project Director

Mike Ricchio, Assistant Director for Administrative Services, Sponsor

Rose Bossio, Assistant Director of Information Services, Sponsor

Darrell Davenport, Deputy CIO, IT Architect

Lisa Horne, ERA Project Manager

Sue Gordon, ISD Business Systems Manager, Technical Project Manager

Rachel Nesse, Outreach Project Manager

Office of the Attorney General Participants

Mark Lyon, Assistant Attorney General

Dennis Gallitano, Special Assistant Attorney General

Office of the Chief Information Officer Participant

Jim Hammond, SR IT Policy and Management Consultant, Office of the Chief Information Officer

Vendor Participants



Please see RFP for complete details.
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Conference Overview

- This session is being recorded
- Presentation will be followed by Q&A
- Verbal responses to questions are unofficial
- Official responses will be posted as RFP addenda
- List of attendees will be published

Conference Overview

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.

Opening Remarks



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About DRS

- DRS has approximately 240 employees 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)
- Employer Support Services (ESS) is the business unit responsible for employer activities, including reporting

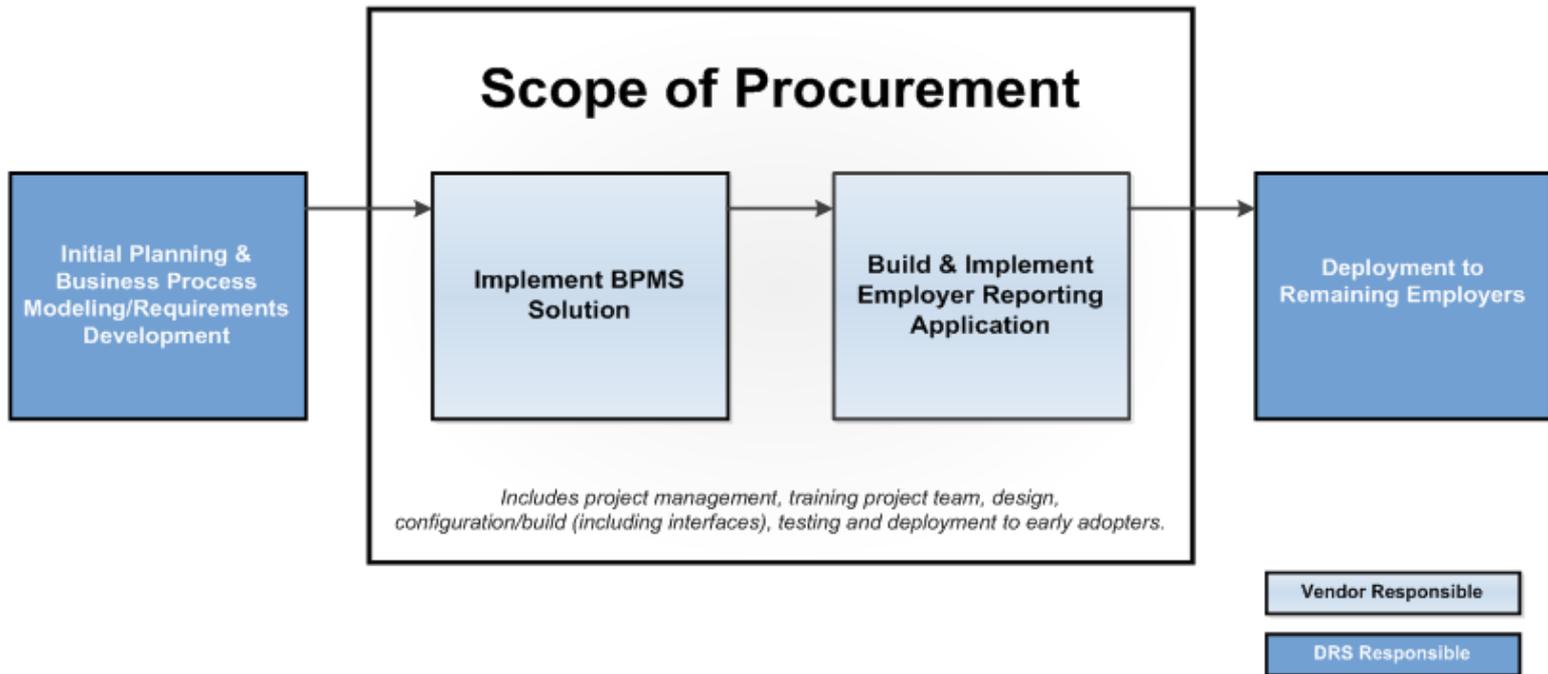
About our Employers

- 2,000+ public employers report information for approximately 400k members
- Types of employers include state agencies, cities, counties, school districts, higher education, etc.
- 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

Project Goals

- Procure and implement a BPMS Solution.
- Use that solution to streamline and improve the employer reporting process and replace the aging Employer Information System.
- Transfer knowledge and provide training to DRS Team Members (*i.e.*, employees of DRS) specific to their role in the BPMS Solution development cycle, thereby enabling DRS to attain self-sufficiency for developing future business processes using BPMS technology.

Scope



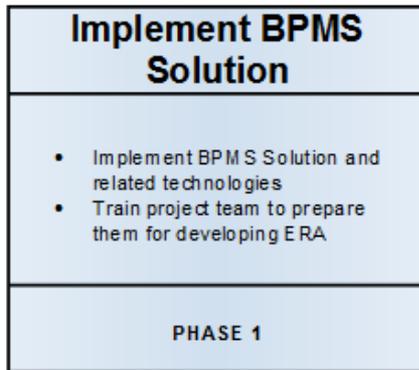
Implement BPMS Solution

- The BPMS Solution and any required integration technologies will be installed and operational.
- The BPMS Solution will be hosted at the State's Data Center.
- The environments (development, test QA, production) will be established and documented procedures will be available.
- DRS Team Members will be trained and prepared to begin supporting the BPMS Solution.

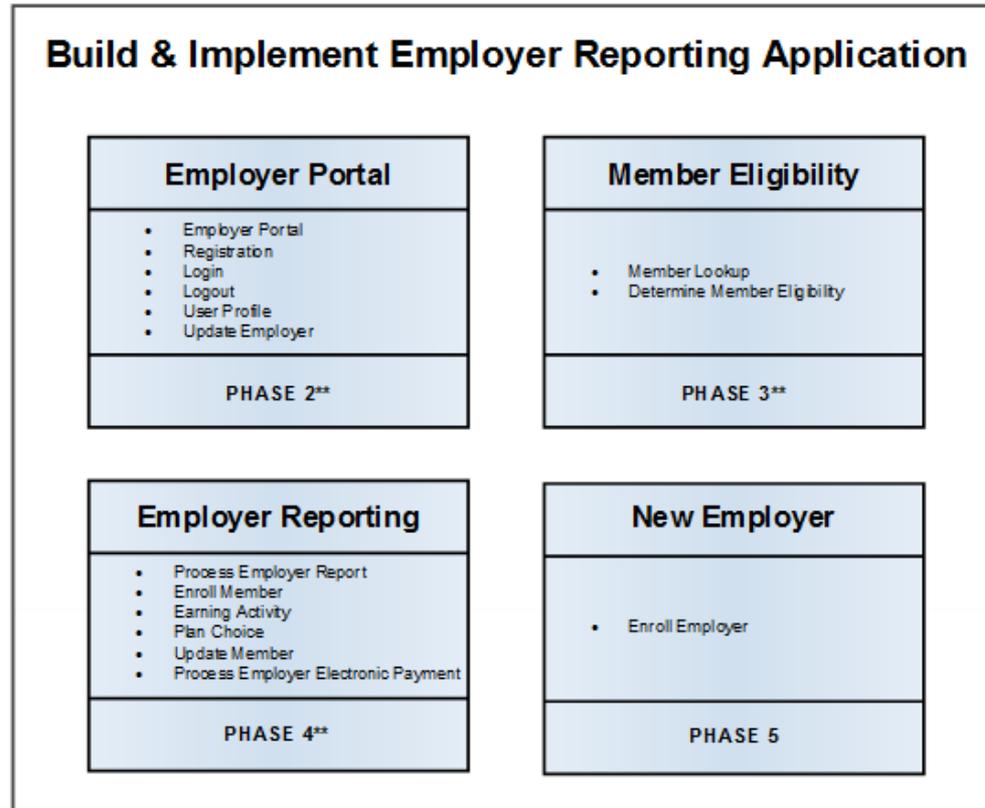
Build and Implement Employer Reporting Application

- Using the BPMS Solution, develop and implement the Employer Reporting Application (ERA).
- Early Adopters (a subset of employers) will begin using ERA as soon as possible.
- DRS will run parallel employer reporting systems (EIS and ERA) until all Employers have migrated to ERA.
- The Prime Vendor project team members and the DRS project team members will work alongside each other during the project to facilitate comprehensive Knowledge Transfer.

Project Phases



**Potential Early Adopter Rollout after phase is complete



Project Timeline

- The project timeline will be developed during the Implementation Planning Study Workshop.
- DRS would like the timeline to have a substantial early adopter involvement that builds momentum for the project.

Procurement - Development

- Developed by DRS with participation by:
 - Executive Sponsors
 - Subject Matter Experts
 - Attorney General's Office (AGO) with Special Assistant Attorney General (SAAG)
- Consulted with peers and other expert resources

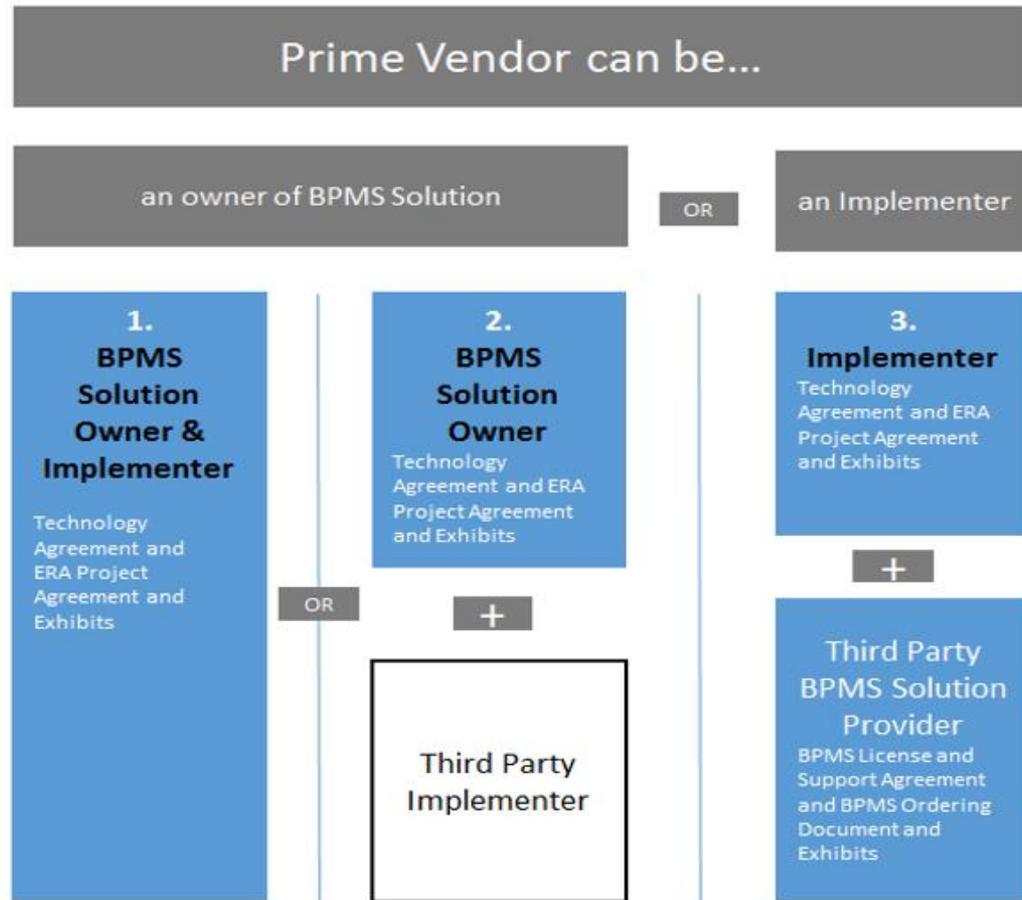
Procurement - Goals

- Fair, open and competitive procurement process
DRS is a Public Agency – subject to state procurement rules and regulations
- Select solution that best meets the requirements of the RFP and provides the best value to DRS

Procurement - Approach

- Approach designed to secure best long-term solution partner
- Bidders at table to clarify details of project
- Lay strong foundation for implementation and on-going maintenance and support

Procurement – Contract Scenarios



Procurement- Cost Proposal and Licensing Model

WA Department of Retirement Systems

Response G – Price Proposal
Employer Reporting Application Project

Worksheet A: BPMS Solution License Fees

A. Complete the applicable section. Base your response on the information DRS supplied in the RFP to estimate size and quantity. Only one section (A or B) may be submitted.

B. Reference the instructions provided in **Response G, Price Proposal Instructions** to provide the following:

A Enterprise Licensing - If you propose an Enterprise license, please complete the following:					
A1	This proposal is an Enterprise-Wide License, as defined in Appendix D.6 - Technology Agreement, Section 3.1.1. (Yes / No)			Enter Yes or No	
A2	Describe the basis for the proposed license fee:				
A3	Component Name	3rd Party Solution Provider, if applicable	List Price (\$)	Discounted Price (\$)	
	[add more lines if needed]				
Total			\$	-	
B Other Licensing Model - If you propose a license model that is not based on an Enterprise license, please complete the following:					
Type of Proposed Licensing Model (Select one or more)					
B1	<input type="checkbox"/> Enterprise <input type="checkbox"/> User Based <input type="checkbox"/> Processor Based <input type="checkbox"/> Transaction Based <input type="checkbox"/> Case Based <input type="checkbox"/> Other				
B2	Describe the Proposed Licensing Model. In narrative form, describe the solution software license model being proposed. Include the basis for cost, including metrics and other information used to derive the licensing cost.				
B3	Component Name	License Type	3rd party Solution Provider, if applicable	List Price (\$)	Discounted Price (\$)
	[add more lines if needed]				
Total			\$	-	

<Insert Bidder's Name Here>
July 21, 2015

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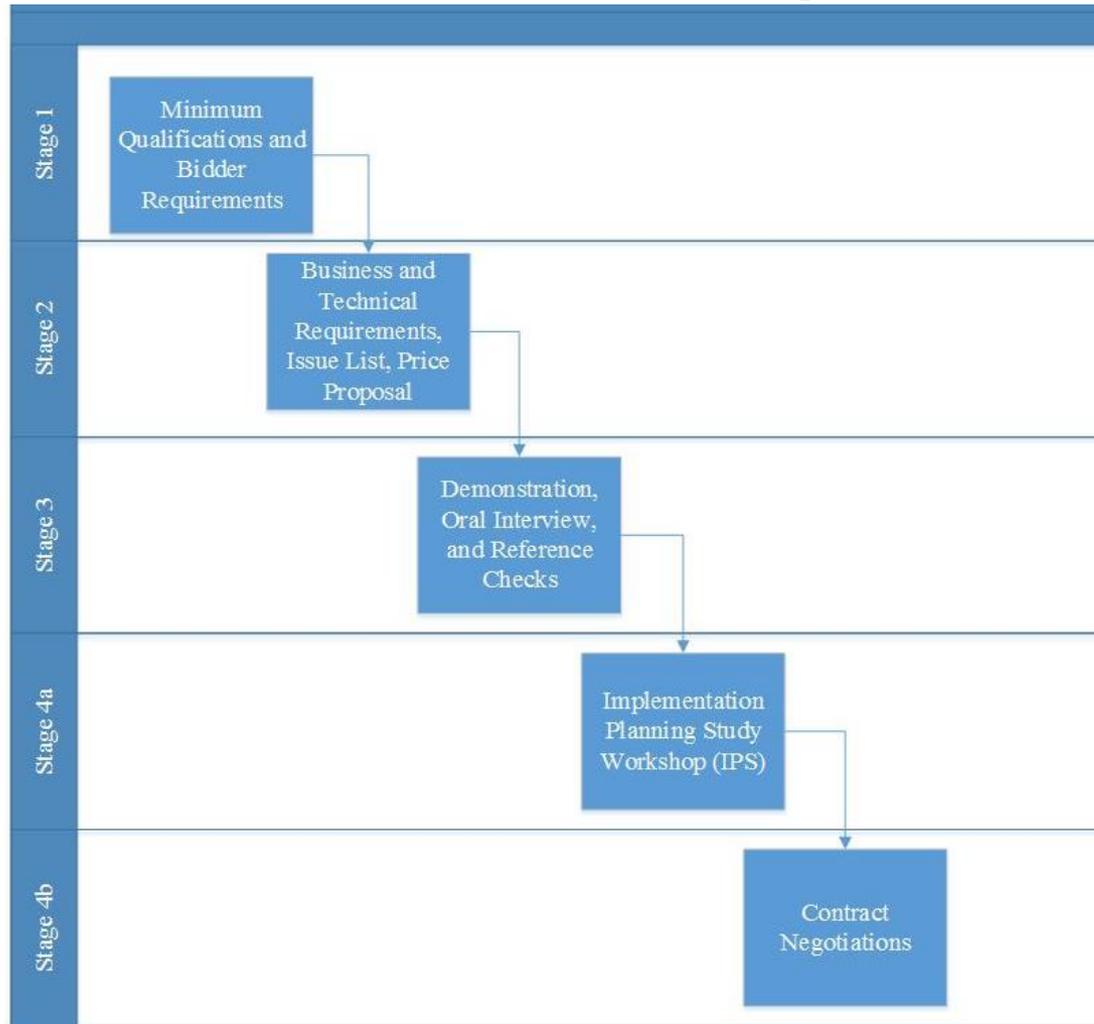


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Procurement - Proposals

- Provide clear, concise, direct, and specific responses to the questions being asked.
- Ensure responses are accurate and all assumptions are expressly identified.
- Proposals will become part of the contract.

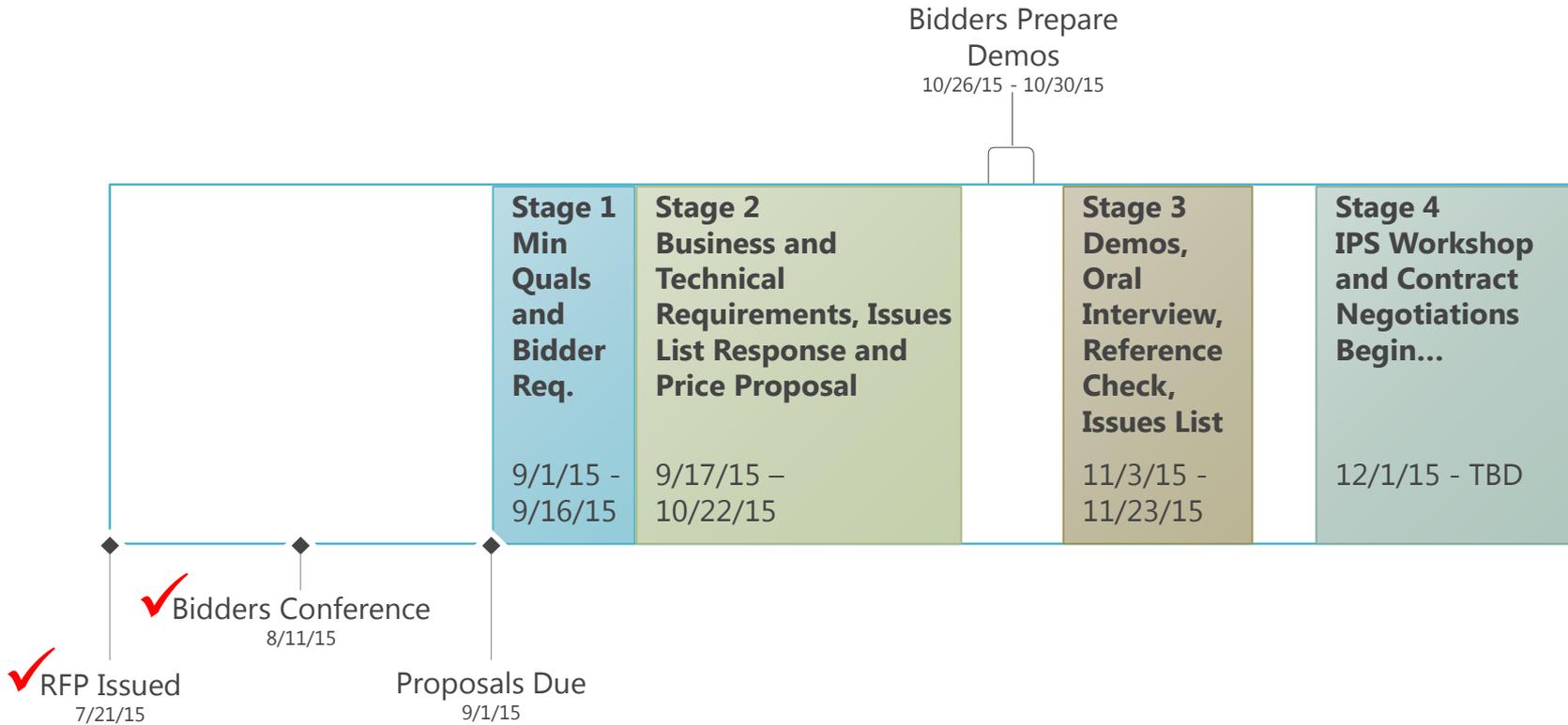
ERA Procurement Stages



Procurement – Contract Negotiations

- Right to require changes to any components of the Bidder’s Proposal, including but not limited to proposed subcontractors
- Bidder negotiation team must:
 - Be empowered to make decisions
 - Include a senior lawyer
 - Maintain continuity
- DRS will process contract revisions
- In-person negotiations or Conference calls at DRS discretion

Procurement – Timeline



Procurement – Contract Award

- RFP will be awarded to the Lowest Responsive and Responsible Bidder as described in section 9.12
- Consideration of the total best value including, but not limited to:
 - Responsiveness of the Proposal to the requirements
 - Competence and responsibility of the Bidder
 - Quality of service
 - Breadth and depth of offering
 - Strength and form of contractual commitments made by Bidder to DRS
 - Licensing model
 - Predictable costs
 - Total cost

Procurement - Reminders

- All amendments and/or addenda will be emailed directly to bidders, posted to WEBS and the DRS website.
- All questions and information regarding this RFP should be directed to the RFP Coordinator and no one else unless otherwise directed in writing by the RFP Coordinator.

A violation of this requirement will be considered a serious breach of good faith, and any Bidder or proposed subcontractor who takes such action may be disqualified from further participation and consideration in the RFP process.

Procurement - Key Dates

Date and Time	Event
Monday, August 17, 2015, Noon PT	Bidder Questions Due
Thursday, August 20, 2015, 5:00 PM PT	DRS Response to Questions Posted
Tuesday, September 1, 2015, 3:00 PM PT	Bidder Proposals Due
Tuesday November 3, 2015 – Friday November 13, 2015	Demonstration and Oral Interviews*

*See RFP, Section 2 (as amended), Key Events and Dates
for the full list of events and dates.*

* Each Bidder will receive demonstration materials one week in advance of their scheduled demonstration.

Questions & Answers

- Questions and Answers
 - Too many to read aloud,
 - Hard copy available on the sign-in desk and
 - On the DRS Vendor website and on WEBS

- Questions from attendees
 - Speak clearly into microphone to aid recording
 - Some questions may be deferred until we post on August 20

Thank You!



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