1. **Bidder Proposed Methodology and Scope of Services Response**

   In a separate double-sided document, no more than 60 pages in length, describe your proposed Solution.

   Describe, in detail and by the sections listed below, the methodology to be used in providing the Services and Deliverables listed below (detailed in the Scope of Services).

   The following naming convention must be used for this document: `19-01<bidder name>Methodology.docx` and it must address each of the following sections and in the following order:

   (a) **Bidder Proposed Solution Overview** – including the following:

   (i) Project Management Methodology

   (ii) Benefits of the Proposed Solution, including examples of past successes in similar engagements

   (iii) Approach to guide, support and collaborate with DRS throughout the Project

   (iv) Approach for Knowledge Transfer

   (v) Methodology for migration without a total code freeze window to accommodate both Project timelines and emergent operational needs. This would be considered a partial freeze so operations can continue to make essential and mandatory enhancements.

   (b) **Phase 1 – Planning**, including the following Deliverables and all related Services

   (i) Project Schedule

   (ii) Executive Summary Report

   (iii) Risk/Issue Management (approach for managing risks)

   (iv) Configuration Management Plan
(c) Phase 2 - Analysis and Detailed Systems Review and Inventory, including the following Deliverables and all related Services

(i) Systems Inventory
(ii) Interfaces Analysis and Recommendation
(iii) Server Hosting Analysis and Recommendation
(iv) Technical Environment Assessment Report
(v) Knowledge Transfer and Training Plan

(d) Phase 3 - Platform Design, including the following Deliverables and all related Services

(i) Security Design Document
(ii) Identity Management Document
(iii) Data Conversion/Migration Design Document
(iv) Application Design Document
(v) Architecture / Environment Design Document

(e) Phase 4 - Platform and Application Migration, including the following Deliverables and all related Services

(i) Test Plan
(ii) DRS Technical Users Need Assessment
(iii) Disaster Recovery / Business Continuity Plan
(iv) Configuration Management Document
(v) Security Configuration Document
(vi) Security Administration Guide
(vii) Interfaces Analysis and Recommendation Document
(viii) Data Conversion
(ix) Application Conversion
(x) Automated testing, if applicable

(f) Phase 5 – Deployment, including the following Deliverables and all related Services

(i) Non-UAT Testing
(ii) UAT Readiness Report
(iii) Deployment Plan
(iv) Technical Documentation
(v) Operations Documentation
(vi) Knowledge Transfer, Training Curriculum and Materials
(vii) Data Conversion Report
(viii) Test Readiness Report
(ix) User and System Acceptance Test Report (viii) UAT Results Report
(x) System Performance and Tuning Report

(g) Phase 6 - Stabilization and Close-Out – including the following Deliverables and all related Services

(i) Stabilization Support Plan
(ii) Project Lessons Learned
2. **Bidder Proposed Solution Architecture**

   In a separate double-sided document, no more than 20 pages in length, describe your proposed Solution.

   The following naming convention must be used for this document: `19-01<bidder name>5Arch.docx` and it must include how the proposed Solution will address each of the following sections and in the following order:

   (a) Overall Application Architecture – include a reference architecture diagram
   
   (b) Access Control – Identity Management
   
   (c) Access Control for products in the proposed Solution
   
   (d) Multi-platform Security Architecture (mapping our security to Linux)
   
   (e) Distributed Data
   
   (f) Performance Factors and Concerns
   
   (g) Extensibility for Data and Open Systems
   
   (h) Deployment Models and Coordination
   
   (i) Adherence to various industry integration standards, identify specific standards
   
   (j) Printing capabilities; replacement for functionality provided by JES, VPS, EOS, OGL
   
   (k) Data Masking Non-Production data

3. **Sample Work Products**

   Provide, as separate attachments, one of each of the following work products, or their equivalents, developed and used in a previous project of similar size and scope:

   (a) Technical Environment Assessment Report – Refer to Exhibit B – Scope of Services, 2.3.5 Technical Environment Assessment Report for DRS requirements for this Deliverable. The following naming convention must be used for this sample work products: `19-01<bidder name>6TechAss.docx`
(b) Data Conversion / Migration Design Document – Refer to Exhibit B – Scope of Services, 2.4.4 Data Conversion / Migration Design Document for DRS requirements for this Deliverable. The following naming convention must be used for this sample work products: **19-01<bidder name>7Data.docx**

(c) Test Plan – Refer to Exhibit B – Scope of Services, 2.5.1 Test Plan for DRS requirements for this Deliverable. The following naming convention must be used for this sample work products: **19-01<bidder name>8TestPlan.docx**

4. Bidder Experience

(a) Provide a description of Bidder’s experience in performing similar engagements to manage, plan, design, develop and implement successful efforts that meet the criteria of the Scope of Services. Clearly describe the scope and scale of those engagements.

Bidder Response:

(b) State the number of years the Bidder has been providing the products and Services being proposed.

Bidder Response:

(c) Disclose any company restructurings, mergers and acquisitions over the past five years or during the course of this Project.

Bidder Response:

(d) DRS anticipates that the Bidder may have different subcontractors based on the applicable phase of the Project. Bidder must identify in its proposal all known subcontractors for each phase as described in **Exhibit B – Scope of Services**.
Bidder Response:

(e) Describe your proposed plans for the use of subcontractors in performing this contract, listing each subcontractor, its proposed role and the estimated percentage of the prospective contract that will be performed by each subcontractor. The bidder should explain the history of the relationship, its longevity and the results of the collaboration. In addition, if the Bidder does not plan to use subcontractors, then the Bidder will respond “No subcontractors”.

Bidder Response:

5. Bidder Engagements

The Bidder is expected to have conducted at least three successful engagements of similar or larger scope and of similar complexity as the Scope of Services and will provide at least three of these engagements as referenced projects. Describe these reference projects in detail, including contact information and the role performed by the Bidder in each engagement (primary, subcontractor, etc.)

<table>
<thead>
<tr>
<th>Engagement Name</th>
<th>Role on Project</th>
<th>Start Date</th>
<th>End Date</th>
<th>Customer</th>
<th>Type of Business</th>
<th>Engagement Description, Role of Bidder, and End Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter your response.</td>
<td>Enter your response.</td>
<td>Enter your response.</td>
<td>Enter your response.</td>
<td>Enter your response.</td>
<td>Enter your response.</td>
<td>Enter your response.</td>
</tr>
</tbody>
</table>


*Exhibit E – Questionnaire Version 2  
Request For Proposals No. 19-01, Mainframe Rehosting  
Page 6 of 13*
6. **Bidder/Subcontractor References**

Use the table below to provide references including the company name, contact name, contact job title, address, telephone number and email address. A minimum of three references must be from comparable engagements. Describe how the references are from similar or larger engagements in scope and complexity as compared to **Exhibit B – Scope of Services** and state the role the Bidder performed in each engagement (primary, subcontractor, etc.).

---

**Exhibit E – Questionnaire Version 2**
Request For Proposals No. 19-01, Mainframe Rehosting
Page 7 of 13
<table>
<thead>
<tr>
<th>Reference 1</th>
<th>Company Name</th>
<th>Enter your response.</th>
<th>Role:</th>
<th>Enter your response.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Job Title</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone Number</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reference 2</th>
<th>Company Name</th>
<th>Enter your response.</th>
<th>Role:</th>
<th>Enter your response.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Job Title</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone Number</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reference 3</th>
<th>Company Name</th>
<th>Enter your response.</th>
<th>Role:</th>
<th>Enter your response.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Job Title</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone Number</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter your response.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Bidders who will bring subcontractors to the engagement must describe the proposed roles and responsibilities of each subcontractor, and provide at least three references for each.

### Reference 1
- **Company Name**: Enter your response.
- **Role**: Enter your response.
- **Contact Name**: Enter your response.
- **Contact Job Title**: Enter your response.
- **Address**: Enter your response.
- **Telephone Number**: Enter your response.
- **Email Address**: Enter your response.

### Reference 2
- **Company Name**: Enter your response.
- **Role**: Enter your response.
- **Contact Name**: Enter your response.
- **Contact Job Title**: Enter your response.
- **Address**: Enter your response.
- **Telephone Number**: Enter your response.
- **Email Address**: Enter your response.

### Reference 3
- **Company Name**: Enter your response.
- **Role**: Enter your response.
- **Contact Name**: Enter your response.
- **Contact Job Title**: Enter your response.
- **Address**: Enter your response.
- **Telephone Number**: Enter your response.
- **Email Address**: Enter your response.
DRS reserves the right to contact all customer references, and that contact will be considered in evaluating the Bidder’s response.

Bidder agrees that, in addition to the references identified by the Bidder in response to this Section 7, DRS may contact any other entity or person with regard to the Bidder and/or proposed staff resources and that these contacts may also be considered by DRS in evaluating the Bidders response.

7. Proposed Bidder Team

Provide the following:

(a) Organization Chart – Provide an organizational chart identifying Key Personnel and leads proposed for the Project. The Project organization chart will identify by name and position the Bidder’s Team (that is, down to at least the lead level), including subcontractors, responsible for the Mainframe Rehosting Project. Attach to this response sheet and indicate in Bidder response. The following naming convention must be used for this document: 19-01<bidder name>9OrgChart.PDF

(b) Joint Resource Plan – Complete Exhibit H - Joint Resource Plan for the bidder team according to the following instructions:

   (i) Enter Bidder name on row 5

   (ii) Update Proposed Phase Titles to reflect proposed phase start on row 2 as needed. The Phase Key including Phase Title and Full Name is listed on Exhibit H – Joint Resource Plan worksheet.

   (iii) Identify Key Personnel by name in column B

   (iv) List team members by role in column C

   (v) For each month and individual, list the percentage availability each team member role will have to the Project

   (vi) For each month and individual, color code each cell with the appropriate location color key as listed on Exhibit H – Joint Resource Plan worksheet to indicate if they will work onsite, offsite or both for that month. The Project Manager identified in the table below is required to be onsite throughout the entire project.
(vii) DRS resources are identified in Exhibit H – Joint Resource Plan in the DRS Team section of the worksheet.

The following naming convention must be used for this document: 19-01<bidder name>10JRP.xlsx

(c) Draft Schedule – Include a proposed high-level schedule with critical milestones, Deliverables, activities, tasks, dependencies and resources for delivering the work and Deliverables listed in Exhibit B – Scope of Services.

The following naming convention must be used for this document: 19-01<bidder name>11Sched.PDF

(d) Proposed Bidder Staff will meet the requirements listed below. The Bidder must respond to the following staff requirements by using the table below

(i) Identify the Project Manager and all other Key Personnel roles that are key to the success of each Phase of the Project.

(ii) Provide an explanation of the responsibilities for each role.

(iii) The Bidder’s Project Manager is required to work onsite for the duration of the Project.

(iv) All proposed Key Personnel will have performed significant roles in at least one project of similar size and scope in the last three years that migrated enterprise z/OS infrastructure inclusive of Adabas / Natural applications, toolsets, utilities and databases to a Linux platform.

(v) Provide a resume for all Key Personnel proposed for this Project. Resumes must reflect qualifications and recent experience relevant to the scope of the work indicated in this RFP. Include at least three references that can be directly contacted to verify the individual’s qualifications and experience. Resumes will include the office location of each person.

(vi) An “X” in a check box indicates the requirement is met.
## Bidder Staff Requirements

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Responsibilities</th>
<th>1 similar Project within 3 years</th>
<th>Resume and References Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>System Architect</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Data Architect</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Technical Lead</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Senior Developer</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Technical Tools Trainer</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Enter Role.</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Enter Role.</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Enter Role.</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Add more rows as needed</td>
<td>Enter Name.</td>
<td>Enter Description.</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
8. **Software Ownership**

Clearly identify all software, tools or services that are required for the Bidder’s implementation methodology to meet DRS’ requirements. Identify whether the software is required to meet the requirements of the Scope of Services. DRS will consider software identified as optional by the Bidder. DRS recognizes that the list may need to be updated after the analysis phase. Add more rows as needed.

Annual software maintenance payment will begin one year after initial software license purchase.

These costs must be reflected in **Exhibit F – Fee Proposal**.

<table>
<thead>
<tr>
<th>Software Name</th>
<th>Version</th>
<th>Required / Optional</th>
<th>Software Owner / Contact Information</th>
<th>Licensing Terms</th>
<th>Support model (online, phone, etc.)</th>
<th>Brief Description of Purpose</th>
<th>Software Cost</th>
<th>Annual Maint Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Exhibit E – Questionnaire, Version 2
Request For Proposals No. 19-01, Mainframe Rehosting
Page 13 of 13*