IT Professional Technical Services
Master Contract Program
T#:902TS

Statement of Work (SOW)
For Technology Services
Issued By

Minnesota Department of Employment and Economic Development (DEED)
Unemployment Insurance (UI) Division

Project Title: E-learning
Service Category: Training – E-Learning Course Development

Business Need

The Minnesota Unemployment Insurance Program is seeking a vendor to produce videos and interactive instructional tools for customers and staff. Customers conduct business with UI through a self-service system. Information on the UI Program and how to use the self-service system is provided to customers on the internet at www.uimn.org. To better serve customers, information about the Program needs to be presented in alternative formats such as videos and interactive e-learning modules. E-learning modules on UI specific subjects need to be developed for staff as part of a blended learning strategy for employee development.

In addition to producing e-learning and videos for the UI Program the vendor will train UI staff to produce e-learning and videos. The ability to produce videos and e-learning modules needs to be developed within the UI Program. The selected vendor will work with the UI Communications Team to develop this capacity. The vendor will identify technology and facility requirements. The vendor will provide training on instructional design for e-learning and technical skills to use the selected development tools. The vendor will then will coach and mentor staff in the development of e-learning.

Over 50 possible topics have been identified. Most of the topics represent multiple e-learning modules. The length will range from a couple of minutes to an hour depending on the topic and audience. The vendor will work with the communication team to finalize and prioritize the list of topics. Criteria for selection include, but are not limited to, shelf-life, value to the audience, and business need. Following is a list of possible topics:

Topic	Estimated Time (minutes)	Description
Applicants		
Applying for benefits	5	How and when to apply for UI
Requesting benefit payments	5	How to request weekly benefits.
About UI	5	Overview of the UI Program for applicants
Passwords	10	Videos on passwords for applicants
Appeal	5	How to file an appeal and the appeal process.
Your account (tour)	5	Overview of the Applicant account screens
Requests for information	5	Instruction on completing questionnaires
Work Search	300	Instructional modules on how to look for work
Employers		
Appeal Tax Rate	10	How to file an appeal and the appeal process.
Appeal Determination	10	How to file an appeal and the appeal process.
Terminating an Inactive account	10	How to terminate an inactive account.
Update owner/officer information	5	How to update account information
Update address information	5	How to update account information
How to submit wage detail	10	How to submit wage detail correctly via file upload.
How to format wage detail	15	How to prepare wage detail records for upload
How to adjust wage detail	5	How to correct incorrect wage detail records
How to Raise and Issue	10	How to create issues using correct type and sub type
When to Raise an Issue	5	The difference between raising an issue and appealing.
Employer questionnaire	5	Instruction on completing questionnaires
Review Benefit Paid Charges	10	How to identify who is receiving UI benefits.
Why/How to correct SS#s	5	How to correct incorrect Soc Sec numbers
How to Register an Account	10	How to register an employer account
Tax rate calculation	5	How UI tax rates are calculated.
Independent Contractor	60	Learn to determine Independent Contractor status.
Employer election of coverage	5	Who is eligible for coverage, and the requirements to continue coverage.
Forecast Tax Rate Calculator/Tax Rate Buydown	10	How to use the forecast tax rate calculator and then do a tax rate buydown.
Agent Authorization	10	How to authorize an agent to act on an employer’s behalf.
Interstate Claims	5	How we handle Interstate claims and how the employer is affected.
Staff		
Bi-Weekly Time Card Entry	10	How to complete biweekly time card.
Data Practices training	60	DEED Data Practices policies and best practices.
Understanding issues	120	Issue terminology, and how and when to create issues.
Adjudication 102	60	Refresher course on basics of adjudication.
Weekly Wage verification	60	Refresher class for weekly wage verification.
Adjudicating Quits	60	How to recognize and adjudicate quit issues.
Adjudicating Discharges	60	How to recognize and adjudicate discharge issues.
Password Issues/Resets	30	How to assist applicants with passwords.
Basic Employer Training	90	How to handle basic employer questions, help register accounts.
Advanced Employer Training	90	How to handle complex employer calls, such as tax rates and changing wage detail.
Rebuttals and Redirects	60	How to submit rebuttals and redirects.

Adjudicating Available and Actively Seeking	90	How to adjudicate available and actively seeking issues.
Adjudicating Quit Staffing	90	How to adjudicate quit staffing issues.
Code of Conduct	60	Compliance training on ethical requirements for State of MN employment.
UI Info Handbook	30	The basics of UI, how to request payments,
UI Basics	150	UI concepts in approximately 5 - 30 minute interactive modules to prepare for customer interactions.
Telephony and pre-texting	60	Phone system requirements login, out, transfer calls; pre-texting to prevent fraud.
Phone Standards for CSC	30	Learn the importance of daily call statistics.
Completing a Field Audit Report	30	How to complete a FAR.
Customer personas/profiles	15	Understanding of the UI customer.
Creating an Employer Account	60	How to register Employer account.
Determining Base Period	30	Determine the correct base period taking complex situations into account
Scheduling REA applicants	15	How to schedule and reschedule REA applicants.
Re-setting Employer Passwords	5	How and when to assist employers creating and /or resetting passwords.

Project Deliverables

Activity Planning

Meet with project staff at the beginning of each activity or development cycle to plan the activity. Communicate with project staff throughout the project as needed.

Activity Reporting

Meet with project staff after each milestone to evaluate progress and to discuss findings. Communicate with project staff throughout the project as needed.

Project Implementation Plan

During project initiation the vendor will meet with UI project staff to finalize the project strategy, methodologies, roles and responsibilities. This is not an additional project negotiation. Project methodology and deliverables will follow what was previously agreed upon in the contract. This is an effort to work out the details. Upon completion of this meeting the vendor will submit a written summary of the plan to the Project Coordinator.

Requirements Report

Conduct business needs and learner analysis to finalize and prioritize the list of e-learning modules to be developed. The vendor will submit a written report defining business and user requirements.

Technology/Facilities Recommendations

Identify technology and facility requirements for e-learning and video development for the UI Program.

E-learning Production

Produce approximately 40 hours of e-learning for customers and staff which include both informational videos and interactive learning modules.

E-learning Evaluation

Evaluate e-learning modules for learner reaction and knowledge transfer.

Staff Training

Train UI staff in e-learning and video design, development and production.

Methodology

Follow best practices in instructional design.
Follow best practices in adult learning.
Follow best practices in project management.
Follow best practices in user centered design.
Meet State of Minnesota accessibility standards including 508 compliance and WCAG 2.0 AA standards (AAA standards desired).
Coordinate and collaborate with the UI communication team and subject matter experts.

Scope

Proposals need to describe how the vendor will meet the requirements listed in the Methodology section and their strategy for delivering the services.

Responders are encouraged to propose additional tasks or activities they believe would improve the project. However, significant variations or additions must be listed separately from the required items on the cost proposal.

Changes in strategies may be required during the project, but should be within this scope. If there is a material increase in scope, contract modifications will be negotiated.

This RFP does not obligate the state to award a contract or complete the project, and the state reserves the right to cancel the solicitation if it is considered to be in its best interest.

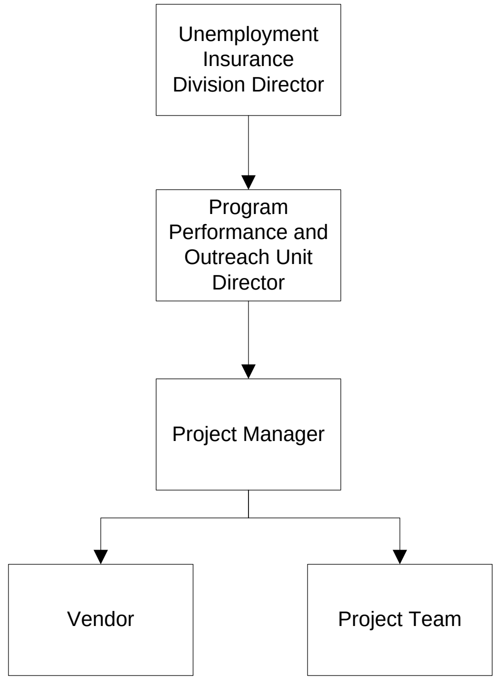
Project Milestones and Schedule (tentative)

Milestones	Schedule
Project Start Date:	01/02/2013
Project Planning & Initiation	01/11/2013
Evaluation and Analysis	2/15/2013
E-learning Development	7/26/2013
Staff Training	7/26/2013
Project End Date	11/04/2013

Project Environment (State Resources)

Staff descriptions:

a) Number of people on the project: 5 - 8
b) Project Coordinator Name: Kevin McDowell
c) Basic organizational structure (organizational chart) of the project



d) Staff proficiency and experience (with methodology, tools, etc.)
User centered design methodologies
UI measures and metrics
Project management
Plain language
Instructional design

Current support structures in place (e.g. hardware/ software applications, training group, tools, etc.), especially those with which the vendor might have to interface or integrate:

- UI Self Service System
- UIMN.org
- UI Intranet (SharePoint)
- UI Communication Team
- UI Training Team
- Section 508 and WCAG 2.0 standards

Agency Project Requirements

The vendor working on this project is required to comply with state data practice laws (Minn. Stat. § 13, and Minn. Rules § 1205).

The vendor will comply with accessibility standards as outlined in MN Statute 16E.03 Paragraph 9 and section 508 of the Rehabilitation Act, United States Code, title 29, section 794d, as amended by the Workforce Investment Act of 1998, Public Law 105-220, August 7, 1998, and the Web Content Accessibility Guidelines, 2.0.

The vendor must be physically available on site (Minnesota Twin Cities Area) for activities that require interaction with UI customers and staff.

Meeting and interview rooms are available for use at Department Headquarters in downtown Saint Paul, MN and in Saint Cloud, Minnesota.

Responsibilities Expected of the Selected Vendor

Planning

- Meet with Project Team to finalize the methodology and process
- Provide professional guidance in planning the project that ensures the final product meets expectations
- Ensure that methodologies and processes are appropriate, achievable and meaningful

Reporting

- Communicate with UI staff throughout the project
- Actively solicit input from UI staff
- Create professional written reports

Other Responsibilities

- Responders are encouraged to propose additional tasks or activities they believe would improve the project; however, significant variations or additions must be listed separately from the required items on the cost proposal
- This Statement of Work does not obligate the state to award a contract or complete the project, and the state reserves the right to cancel the solicitation if it is considered to be in its best interest

Required Skills

- Instructional design (50 points)
- E-learning design and development (50 points)
- Principles of adult learning (50 points)
- Government plain language standards (50 points)
- User centered design (50 points)
- Project management (25 points)
- Accessibility standards (25 points)

Desired Skills

- Knowledge and experience of the Unemployment Insurance Program (50 points)
- Experience working with highly regulated industries (50 points)

Process Schedule

Deadline for questions	11/23/2012, 4:00 pm Central Time
Proposals due	12/03/2012, 2:30 pm Central Time
Anticipated proposal evaluation begins	12/04/2012, 9:00 am Central Time
Anticipated proposal evaluation & decision	12/14/2012, 2:00 pm Central Time

Questions

Any questions regarding this Statement of Work should be submitted via mail or e-mail by 11/23/2012, 4:00 pm Central Time:

Kevin McDowell, Project Coordinator
Dept of Employment and Economic Development
First National Bank Building, Suite E200
332 Minnesota Street
St. Paul MN 55101

Email: Kevin.McDowell@state.mn.us
Phone: (651)259-7307

Questions and answers will be posted on the Office of Enterprise Technology website by approximately 11/26/2012, 4:00 pm Central Time (http://www.oet.state.mn.us/mastercontract/statements/mcp902ts_active.html).

SOW Evaluation Process

Responses will be evaluated on "best value" (1000 possible points):

40% (percent): Qualifications (400 pts)

- Instructional design (50 points)
- E-learning design and development (50 points)
- Principles of adult learning (50 points)
- Government plain language standards (50 points)
- User centered design (50 points)
- Project management (25 points)
- Accessibility standards (25 points)
- Knowledge and experience of the Unemployment Insurance Program (50 points)
- Experience working with highly regulated industries (50 points)

30% (percent): Cost (300 pts)

Best cost receives 100% of the points; all other proposals receive points relative to the best cost proposal.

30% (percent): Project Plan (300 pts)

Vendor's plan to complete the project.

All responses meeting the requirements of this SOW and received by the due date and time will be considered. Late responses will not be considered.

Proposals must include three references. References will be checked for the top candidate(s) to verify qualifications.

Proposals will be reviewed and scored by UI staff. The proposals with the highest scores will be reviewed by project management for final selection. At the discretion of project management vendors may be interviewed in making the final selection.

Statement of Work does not obligate the state to award a work order or complete the assignment, and the state reserves the right to cancel the solicitation if it is considered to be in its best interest. The Agency reserves the right to reject any and all proposals.

Response Requirements

Three (3) original copies of the proposal (loose bound)

One (1) original copy of the price bid and target group status, sealed in a separate envelope (do not include with proposals)

Conflict of interest statement as it relates to this project

Required forms to be returned or additional provisions that must be included in proposal

a) Affirmative Action Certificate of Compliance (if over $100,000)
http://www.mmd.admin.state.mn.us/doc/affaction.doc
b) Affidavit of non-collusion
http://www.mmd.admin.state.mn.us/doc/noncollusion.doc
c) Immigration Status Certification (if over $50,000)
http://www.mmd.admin.state.mn.us/doc/immstatcert.doc
d) Location of Service Disclosure
http://www.mmd.admin.state.mn.us/Doc/ForeignOutsourcingDisclosureCertification.doc
e) Certification Regarding Lobbying
http://www.mmd.admin.state.mn.us/doc/lobbying.doc
f) Veteran-Owned/Service Disabled Veteran-Owned Preference Form
http://www.mmd.admin.state.mn.us/doc/vetpref.doc

Proposal Format and Content

Cover Page:

[Date]
[Company name and contact information]
[Title] **"UI E-learning Project"**
To: Kevin McDowell, Project Coordinator
Minnesota Department of Employment and Economic Development
First National Bank Building, Suite E200
332 Minnesota Street
St. Paul, MN 55101
From: [Company representative, title and contact information]

Qualifications:

Description of the organization

Key Personnel
Knowledge and experience in each required skill
Experience working on similar initiatives

Education
Accomplishments
Role in this project

Experience in each of the following areas

- Instructional design
- E-learning design and development
- Principles of adult learning
- Government plain language standards
- User centered design
- Project management
- Accessibility standards
- Knowledge and experience of the Unemployment Insurance Program
- Experience working with highly regulated industries

Project Plan:

Describe methodologies and strategy to complete project objectives and meet project requirements.

Timeline:

Milestones	**Schedule**	**Deliverables**

References (3):
Contact Name
Company Name
Location
Phone
Email
Relationship
Describe the services provided

Cost Proposal: (submit separate from the Project Proposal)

Include the following:
Total Project Cost
Cost break down
Project management
E-learning production
E-learning evaluation
Staff training
Honorarium

Proposal Submission Instructions

All responses must be in writing and delivered to:

Kevin McDowell, Project Coordinator

Dept of Employment and Economic Development
First National Bank Building, Suite E200
332 Minnesota Street
St. Paul MN 55101

All proposals must be received not later than 2:30 p.m., Central Time, 12/03, 2012. DEED, Attn: Kevin McDowell, First National Bank Building, 332 Minnesota Street, Suite E200, St. Paul MN 55101. **Late responses will not be considered.**

General Requirements

Proposal Contents

By submission of a proposal, Responder warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of this work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the responder to suspension or debarment proceedings as well as other remedies available by law.

Liability

Indemnification

In the performance of this contract by Contractor, or Contractor's agents or employees, the contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney's fees incurred by the state, to the extent caused by Contractor's:

1) Intentional, willful, or negligent acts or omissions; or
2) Actions that give rise to strict liability; or
3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State's failure to fulfill its obligation under this contract.

Disposition of Responses

All materials submitted in response to this SOW will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected vendor. If the Responder submits information in response to this SOW that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Responder must: clearly mark all trade secret materials in its response at the time the response is submitted, include a statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this RFP, the Responder agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Responder to be proprietary or trade secret materials.

Conflicts of Interest

Responder must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The responder warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a vendor is unable or potentially unable to render impartial assistance or advice to the State, or the vendor's objectivity in performing the contract work is or might be otherwise impaired, or the vendor has an unfair competitive advantage. The responder agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organization conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the responder was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime contractor, and the terms "contract," "contractor," and "contracting officer" modified appropriately to preserve the State's rights.

IT Accessibility Standards

Responses to this solicitation must comply with the Minnesota IT Accessibility Standards effective September 1, 2010, which entails, in part, the Web Content Accessibility Guidelines (WCAG) 2.0 (Level AA) and Section 508 Subparts A-D which can be viewed at: **http://www.mmd.admin.state.mn.us/pdf/accessibility_standard.pdf**

Nonvisual Access Standards

Nonvisual access standards require:

1) The effective interactive control and use of the technology, including the operating system, applications programs, prompts, and format of the data presented, are readily achievable by nonvisual means;
2) That the nonvisual access technology must be compatible with information technology used by other individuals with whom the blind or visually impaired individual must interact;
3) That nonvisual access technology must be integrated into networks used to share communications among employees, program participants, and the public; and
4) That the nonvisual access technology must have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

Preference to Targeted Group and Economically Disadvantaged Business and Individuals

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group Businesses and individuals submitting proposals as prime contractors shall receive the equivalent of a six percent preference in the evaluation of their proposal, and certified Economically Disadvantaged Businesses and individuals submitting proposals as prime contractors shall receive the equivalent of a six percent preference in the evaluation of their proposal. Eligible TG businesses must be currently certified by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials Management Helpline at 651.296.2600, or you may reach the Helpline by email at mmdhelp.line@state.mn.us. For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

Veteran-owned/Service Disabled Veteran-Owned Preference

In accordance with Minnesota Statute §16C.16, subd. 6a, veteran-owned businesses with their principal place of business in Minnesota and verified as eligible by the United States Department of Veterans Affairs' Center for Veteran Enterprises (CVE Verified) will receive up to a 6 percent preference in the evaluation of its proposal.

Eligible veteran-owned small businesses include CVE verified small businesses that are majority-owned and operated by either recently separated veterans, veterans with service-connected disabilities, and any other veteran-owned small businesses (pursuant to Minnesota Statute §16C.16, subd. 6a).

Information regarding CVE verification may be found at http://www.vetbiz.gov.

Eligible veteran-owned small businesses should complete and **sign** the **Veteran-Owned Preference Form** in this solicitation. Only eligible, CVE verified, veteran-owned small businesses that provide the required documentation, per the form, will be given the preference.

Foreign Outsourcing of Work Prohibited

All services under this contract shall be performed within the borders of the United States. All storage and processing of information shall be performed within the borders of the United States. This provision also applies to work performed by subcontractors at all tiers.