[Instructions for developing a RFO are listed throughout this document in red text and brackets. Instructions should be deleted before finalizing the RFO. The template offered is a suggested format that organizations may use. Organizations should complete only the parts that are relevant to their request. There may be segments of the template that do not apply to every request and can be removed if not applicable to the request.]

DATA ANALYTICS MASTER CONTRACT PROGRAM

Master Contract T-Number: 18ADA

Request for Offer

For Data Analytics Services

**NOTICE: This Statement of Work does not obligate its issuer to award a Work Order Contract or complete the project or engagement, and the issuer reserves its right to cancel the solicitation if it is considered to be in its best interest. The issuer reserves the right to reject any and all proposals.**

### Issuer: [ENTER NAME OF REQUESTING ORGANIZATION]

**Project Title:** [Enter Project Title]

**Service Category(ies) [check all that apply]:**

**Category One - Medicaid Payments, Medicaid Program Integrity, Fraud Prevention and Detection:**

**Category Two: Data Driven Organizational Change**

**Category Three (Other)**

* Comparative Analysis
* Customer-focused Data Analytics
* Strategic Planning and Data Quality Analysis
* Tax Collection, Fraud Prevention, and Detection
* Fleet Management Improvements
* Unemployment Compensation
* Worker’s Compensation
* Data Analytics to Support Program Integrity
* eCQM and Population Health Data Analytics
* State Building Efficiency
* Strategic Sourcing

# Business Need

[The business need should address items such as:

* A description of the business and functional needs that this RFO is to address.
* Any history that might be pertinent, e.g. previous and future phases
* Key portions of the Business Case, such as:
  + Intentions/Values of the desired solution
  + Focus Statement
  + Indicate stakeholders in the project
  + Any constraints on the solution
  + Context – identifies the expectations and boundaries of this RFO
  + How the project fits into the enterprise/organization strategic direction or plan.]

## Project or Engagement Deliverables

[The project deliverables should address items such as:

* Desired system features
* Specific deliverables required]

## Project or Engagement Milestones and Schedule

* Anticipated Project Start Date: [ Enter the anticipated start date for the engagement]
* Key deliverable dates: [Enter any key deliverables and their corresponding due dates]
* Anticipated End Date: [ Enter the anticipated end date for the engagement]

## Project or Engagement Environment

[This section should include items such as:

* Staff descriptions:
  + Number of people on the project
  + Basic organizational structure (organizational chart) of the project
  + Staff proficiency levels and experience (with methodology, tools, etc.)
* 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.
* Relevant models such as an organizational chart, event model, process model, etc.]

**Project Requirements**

[Describe any pre-identified implementation requirements, such as:

* If the project or engagement will involve training of staff
* Anticipated ongoing hardware/software, maintenance, etc. (if applicable)
* Compliance with applicable guidelines or standards
* Implementation of industry “best practices”]
* Accessibility (This is the place where any accessibility needs should be outlined where it be for electronic documents or for any IT)

## Responsibilities Expected of the Selected Contractor

[Identify expectations such as:

* Proposed change management process
* Contractor staffing
* Project Documentation
* Project management responsibilities
* Providing training and knowledge transfer
* Testing and acceptance criteria
* Warranty requirement(s)
* Work plan

**Minimum Qualifications**

[These must be based on objective, non-subjective criteria. For state agencies, the skills must be evaluated as pass/fail requirements. For CPV members, please consult with your purchasing department for guidance and direction. The following list is an example. The requirements should be tailored to the specific work that needs to be done.]

* Years of experience [Be specific, e.g. 3 years minimum]
* Completion of three projects/engagements similar in size and scope with public entities of similar size. Identify the projects/engagements and provide a contact name and information for each.

**Desired and Preferred Skills** [The scoring of the desired skills must be reflected in your evaluation criteria. The desired skills section should just list the skill being sought, not a number of associated years or engagements.]

Enter any desired skills that you would like the contractor/resource(s) to have such as:

* Publication of one or more report on cost savings and/or quality improvement for client.
* Experience with creating accessible IT or electronic documents

##### Proposed/Estimated Schedule (subject to change at discretion of Issuer)

* Deadline for submission of questions MM/DD/YYYY, Time
* Response to questions MM/DD/YYYY, Time
* Proposal submission deadline MM/DD/YYYY, Time

**Questions**

Any questions regarding this Request for Offer should be submitted via e-mail according to the date and time listed in the process schedule to:

Name: [Enter the name of the individual receiving the vendor questions]

Email Address: [Enter the email address for the individual receiving the vendor questions]

Questions and answers will be posted via an emailed addendum according to the process schedule above. The Addendum will be emailed to Company Contacts listed on the program website.

Other persons ARE NOT authorized to discuss this RFO or its requirements with anyone throughout the selection process and responders should not rely on information obtained from non-authorized individuals. If it is discovered a Responder contacted other State staff other than the individual above, the responder’s proposal may be removed from further consideration.

## RFO Evaluation Process (Scored based on percentage or points as indicated.)

[Describe what the potential responders need to know or what is required by law.]

All responses received by the deadline will be evaluated. The State reserves the right, based on the scores of the proposals, to create a short-listing of vendors who have received the highest scores to interview, or conduct demonstrations/presentations. The State reserves the right to seek best and final offers from one or more responders. A 100-point scale will be used to create the final evaluation recommendation. The factors and weighting on which proposals will be judged are:

[Describe categories and scoring methodology/criteria using the following as examples. Please note the evaluation criteria indicated below are examples only. Evaluation criteria should be tailored to the specifics of the work and consistent with the required and desired skills identified above.]

1. Expressed understanding of project objectives 10%
2. Deliverables and work plan 20%
3. Qualifications/experience of personnel working on the project 40%
4. Cost 30%

## Response Requirements

[Clearly identify what must be included in the proposal and how it should be organized. Response Requirements should correlate with the Evaluation Criteria listed above. All requested information must be scored and all scored information must be asked for in the response requirements below. Contractor must be an approved master contractor eligible to provide the service(s) identified in this SOW.]

The following is a SAMPLE – YOU MUST CUSTOMIZE THIS TO MATCH YOUR POSTING.

1. Introduction

* Master Contractor Name
* Master Contractor Address
* Contact Name for Master Contractor
* Contact Name’s direct phone/cell phone (if applicable)
* Contact Name’s email address

1. Company overview, including contractor’s:

* Brief history
* Detailed response on how the Minimum Qualifications are met

1. Detailed response to project or engagement requirements including but not limited to:

* Description of contractor’s understanding of the project or engagement
* Explanation of contractor’s proposed solution and how it will meet the requirements
* Work plan. DO NOT include cost in this document. If cost is included in this document, the proposal may be disqualified as non-responsive.
* Summary of project management, e.g. quality management, risk assessment/management, etc.
* Contract and change management procedures
* Documentation of progress such as status reports
* Proposed organization and staffing (resumes)
* Description of any software or hardware that may be required to complete project or engagement

1. Three references for completed projects/engagements of similar size and scope
2. Cost Proposal – Include a separate document labeled “Cost Proposal” which includes the name of each respective role, and their corresponding proposed hourly rate.
3. Submit the following Statements and Forms:
   * Conflict of interest statement as it relates to this project/engagement
   * Affidavit of Non-Collusion

<http://www.mmd.admin.state.mn.us/doc/noncollusion.doc>

* + Certification Regarding Lobbying (required if proposal exceeds $100,000, including extension options)

<http://www.mmd.admin.state.mn.us/doc/lobbying.doc>

* + Work Force Certification (required if proposal exceeds $100,000, including extension options)

<http://www.mmd.admin.state.mn.us/doc/WorkForceCert.doc>x

## Proposal Submission Instructions [Instructions should be tailored by the issuer to comply with appropriate submission standards and requirements such as the example below.]

* Addressee’s Information
  1. Individual’s name to whom the proposal should be addressed

1. How and where to respond (e.g. mailing address or e-mail address)
2. How to label the response if applicable (e.g. Attention: \_\_\_ Selection Committee)

* How to submit (e.g. regular mail, registered mail, in person, e-mail, etc.)
* Number of copies

**Late proposals will not be considered or evaluated.**

**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 a work order contract. 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.

**Disposition of Responses**

All materials submitted in response to this RFP 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 RFP that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minnesota Statute § 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.

Notwithstanding the above, if the State contracting party is part of the judicial branch, the release of data shall be in accordance with the Rules of Public Access to Records of the Judicial Branch promulgated by the Minnesota Supreme Court as the same may be amended from time to time.

**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 Statement of Work. The list should identify the name of the entity, the relationship, and a brief explanation of the conflict.

**Organizational Conflicts of Interest**

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 contractor is unable or potentially unable to render impartial assistance or advice to the State, or the contractor’s objectivity in performing the contract work is or might be otherwise impaired, or the contractor 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 Office of State Procurement (“OSP”) 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 OSP, 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.

**Contingency Fees Prohibited**

Pursuant to Minnesota Statutes Section 10A.06, no person may act as or employ a lobbyist for compensation that is dependent upon the result or outcome of any legislation or administrative action.

**Reimbursements**

Reimbursement for travel and subsistence expenses actually and necessarily incurred by the contractor as a result of the contract will be in no greater amount than provided in the current "Commissioner’s Plan” promulgated by the commissioner of Employee Relations. Reimbursements will not be made for travel and subsistence expenses incurred outside Minnesota unless it has received the State’s prior written approval for out of state travel. Minnesota will be considered the home state for determining whether travel is out of state.

**IT Accessibility Standards**

Responses to this solicitation may be required to 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**](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.

*[Required clause below for all contracts that will NOT be funded either in whole or in part by federal money and that are subject to federal disadvantaged business enterprise regulations.]*

**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 (TG) businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal, and certified Economically Disadvantaged (ED) businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal. Eligible TG businesses and ED businesses must be currently certified by the Office of Equity in Procurement (OEP) prior to the solicitation opening date and time. For information regarding certification, contact OEP at 651-201-2402 or [procurement.equity@state.mn.us](mailto:procurement.equity@state.mn.us). For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

**Veteran-owned/Small Business Preference**

Unless a greater preference is applicable and allowed by law, in accordance with Minn. Stat. § 16C.16, subd. 6a, the Commissioner of Administration will award a 6% preference in the amount bid on state procurement to certified small businesses that are majority owned and operated by veterans.

A small business qualifies for the veteran-owned preference when it meets one of the following requirements.  1) The business has been certified by the Office of Equity in Procurement as being a veteran-owned or service-disabled veteran-owned small business. 2) The principal place of business is in Minnesota AND the United States Department of Veterans Affairs verifies the business as being a veteran-owned or service-disabled veteran-owned small business under Public Law 109-461 and Code of Federal Regulations, title 38, part 74 (Supported By Documentation).  *See* Minn. Stat. § 16C.19(d).

Submit the appropriate documentation with the solicitation response to claim the veteran-owned preference.  Statutory requirements and documentation must be met by the solicitation response due date and time to be awarded the preference.

*[OPTIONAL: Based on security concerns, the organization may include the paragraph below to prohibit the use of foreign outsourcing. You cannot include this paragraph if the work order resulting from this Statement of Work and all its extensions may be in excess of the WTO threshold of $558,000]*

***Foreign Outsourcing of Work is 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 levels.*

[IF YOUR CONTRACT VALUE MAY EXCEED **$500,000.00**,INCLUDING ALL EXTENSIONS,YOU MUST ADD THE FOLLOWING CONTRACT LANGUAGE.]

**Subcontractor Reporting**

The State of Minnesota is committed to diversity and inclusion in public procurement. If the total value of your contract may exceed $500,000, including all extension options, you must track and report, on a quarterly basis, the amount you spend with diverse small businesses. When this applies, you will be provided free access to a portal for this purpose, and the requirement will continue as long as the contract is in effect.