State of Nevada
Department of Health and Human Services, Division of Welfare and Support Services

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INDEPENDENT VERIFICATION & VALIDATION (IV&V) FOR CHILD SUPPORT ENFORCEMENT (CSE) SYSTEM REPLACEMENT

RFP #3475

Part IA

TECHNICAL PROPOSAL

October 19, 2017

Section I: Title Page

Title page with the following information:

Part IA – Technical Proposal	
RFP Title:	***IV&V for Child Support Enforcement System Replacement Project***
RFP:	***3475***
Vendor Name:	***FusionSTO***
Address:	***PO Box 6954, Santa Fe, NM 87502***
Opening Date:	***10/19/17***
Opening Time:	***2:00 PM***

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Section III – Vendor Information Sheet

The FusionSTO Vendor Information Sheet is on the following page.

VENDOR INFORMATION SHEET FOR RFP 3475

Vendor Shall:

A) Provide all requested information in the space provided next to each numbered question. The information provided in Sections V1 through V6 shall be used for development of the contract;

B) Type or print responses; and

C) Include this Vendor Information Sheet in Section III of the Technical Proposal.

V1	Company Name	FusionSTO

V2	Street Address	325 Ojo De La Vaca

V3	City, State, ZIP	Santa Fe, NM 87508

V4	Telephone Number		
	Area Code: 505	Number: 469-8923	Extension: N/A

V5	Facsimile Number		
	Area Code: 505	Number: 796-6688	Extension: N/A

V6	Toll Free Number		
	Area Code: N/A	Number: N/A	Extension: N/A

V7	***Contact Person for Questions / Contract Negotiations, including address if different than above***
	Name: Mary James
	Title: Chief Operating Officer
	Address:
	Email Address: mjames@fusionsto.com

V8	Telephone Number for Contact Person		
	Area Code: 505	Number: 690-1778	Extension: N/A

V9	Facsimile Number for Contact Person		
	Area Code: 505	Number: 796-6688	Extension: N/A

V10	***Name of Individual Authorized to Bind the Organization***	
	Name: Mary James	Title: Chief Operating Officer

V11	Signature ***(Individual shall be legally authorized to bind the vendor per NRS 333.337)***	
	Signature:	Date:

Section IV – State Documents

The State documents section shall include the following:

A. ***3475 Amendment 1 final.docx dated September 15, 2017***
B. ***3475 Amendment 2 final.docx dated September 29, 2017***
C. ***Attachment A – Confidentiality and Certification of Indemnification***
D. ***Attachment B – Vendor Certifications***
E. ***Attachment J – Certification regarding Lobbying***
F. ***PMP Certifications***

Completed State Documents for FusionSTO are on the following 27 pages.

State of Nevada
Department Administration
Purchasing Division
515 E. Musser Street, Suite 300
Carson City, NV 89701

Brian Sandoval
Governor

Jeffrey Haag
Administrator

SUBJECT:	Amendment 1 to Request for Proposal 3475
RFP TITLE:	**Independent Verification & Validation (IV&V) for Child Support Enforcement (CSE) System Replacement**
DATE OF AMENDMENT:	September 15, 2017
DATE OF RFP RELEASE:	August 21, 2017
OPENING DATE:	October 19, 2017
OPENING TIME:	2:00 PM
CONTACT:	Ronda Miller, Procurement Staff Member

The following shall be a part of RFP 3475. If a vendor has already returned a proposal and any of the information provided below changes that proposal, please submit the changes along with this amendment. You need not re-submit an entire proposal prior to the opening date and time.

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1. What is the Department's estimated cost of the Child Support Enforcement Computer System Modernization Independent Verification and Validation (IV&V) project?

   The state declines to release budget information.

2. Has the Department allocated funding for the Child Support Enforcement Computer System Modernization Independent Verification and Validation (IV&V) project? If so, through which source (budget, CIP, state/federal grant)?

   Refer to the State's response to Question #1.

3. Has a time frame been established in which a RFP(s) may be issued for an implementation vendor, quality assurance services (QA), a project management office (PMO), and staff augmentation, in addition to the IV&V services requested in this RFP?

   Yes, refer to State solicitation opportunities: RFP 3462, RFP 3433, and RFP 3267.

   At this time we do not anticipate releasing a separate RFP for staff augmentation services.

4. Which other systems will have to integrate or interface with the Child Support Enforcement Computer System Modernization Independent Verification and Validation (IV&V) and which vendor provided each system?

   Refer to RFP 3462, technical requirements.

5. Who is the project manager/IT contact for this project and what is their contact information?

This information will be provided to the selected vendor.

6. When and through what procurement method does the Department anticipate procuring the related staff augmentation services?

   If DWSS requires staff augmentation, a contract amendment will be provided to the selected vendor.

7. Please confirm that the state's Feasibility contractor is precluded from award of the IV&V contract.

   Yes, the State's Feasibility Study contractor is precluded from award of the IV&V Services contract.

8. Section 6.4, page 53. The State shall pay all invoiced amounts, less a 15% hold back, following receipt of the invoice and a fully completed project deliverable sign-off form. Question: The use of a hold back is contrary to the nature and objectives of an IV&V assessment. IV&V is an independent assessment that delivers findings that are independent of the developing and sponsoring organizations. The findings of an IV&V assessment and the payment for the assessment should not be subject to negotiations. If the IV&V deliverable meets the contractual requirements it should be paid in full at the time of acceptance. Introducing a hold back that is released subject to negotiations creates an unnecessary conflict of interest. Request that the state remove the hold back provision.

   The state declines this request.

9. Section 11.2, page 61. Effective July 1, 2017, a five percent (5%) preference will be awarded to businesses based in Nevada. Question: Our company is based in Denver but has offices across the US including Nevada. Our staff for this project are primarily Nevada based. Would this qualify for the five percent (5%) preference?

   No.

10. What is the overall budget for the NV CSE Replacement project?

    Refer to the State's response to Question #1

11. What is the budget for IV&V services for this project?

    Refer to the State's response to Question #1

12. Please identify any firms that are prohibited from being awarded this contract.

    Refer to the State's response to Question #7

13. Section 3.2.3 states: "Vendor's response must be limited to no more than five (5) pages per task..." To confirm, Section 3.1.11 includes the two tasks (Planning & Administration and IV&V Activities), correct?

The five (5) page limit applies to each task, sub-task, service, or activity in the RFP, including those associated with deliverables. If additional pages are needed for a particular task, the five (5) page limit can be applied to all tasks in the RFP as an overall average.

14. Must each IV&V team member have all of the qualifications listed in Section 4.4.2 Individual Verification Services Team Member Qualifications or may the combined qualifications of all team members fulfill these qualifications?

    Each IV&V team member must have all of the qualifications listed in Section 4.4.2 Individual Verification Services Team Member Qualifications.

15. Section 10.2.2.5 references 'System Requirements.' To confirm for purposes of this proposal, these requirements are the IV&V Requirements listed in Section 3.6.3, correct?

    Section 10.2.2.5 is not applicable.

16. Page 12 - Section 3.1.2 Scope of Work: The RFP states the IV&V Vendor is supposed to actively participate in all meetings. However, the State also points out the need to limit onsite presence and oversight. How many and what type of meetings is the IV&V Vendor expected to attend? Please clarify.

    The IV&V vendor will be expected to actively participate in all meetings during semi-annual IV&V review periods as needed to meet the goals, objectives and requirements of this solicitation.

17. Page 16 - Section 3.1.11.1.b and c Planning and Administration: How many and what type of meetings is the IV&V Vendor expected to attend during the 6-month period? As the report is scheduled to be developed and completed within 8-10 weeks, this information will be valuable for coverage and staffing.

    Refer to the State's response to Question #16.

18. Page 16 - Section 3.1.11.1.d Planning and Administration: Are monthly status reports required for months where the Vendor has no activity?

    No. Refer to section 3.5.1.4.

19. Page 16 - Section 3.1.11.2.g IV&V Activities: Does the document archive need to reside on the State servers?

    No. The documents are sent directly to the OCSE and the independent Contract Officer. The State requests a courtesy copy, which will reside on the State servers. The courtesy copy on the State servers should not be considered a backup to the originals maintained by both the IV&V vendor and independent Contract Officer.

20. Section 17 - Section 3.2.3 Vendor Response to Scope of Work: Please clarify what is defined as a "task." What sections are limited to no more than five (5) pages?

    Refer to the State's response to Question #13.

21. Page 48 - Section 4.7 Project Management - Section 4.13 Project Software Tools: Please explain where these RFP sections should be referenced in vendor responses.

Identify section within your submitted technical response. Refer to the State's response to Question #73 in reference to sections 4.10 through 4.13.

22. Page 57 - Section 10.2.2.5 Section V. System Requirements: Please explain what section of the RFP this refers to.

Refer to the State's response to Question #15.

23. In section 2.1 Project, the RFP states: "The State will contract for an implementation vendor, quality assurance services (QA), a project management office (PMO), and staff augmentation, in addition to the IV&V services requested in this RFP."

Will the State be releasing additional RFPs related to the services mentioned above? If so, does the State have planned or targeted release dates for those solicitations?

Refer to the State's response to Question #3

24. Page 46 - Section 4.4.2 Individual Verification Services Team Member Qualifications: Is each proposed team member required to meet all of the qualifications listed in this section (4.4.2.1 - 4.4.2.16), or can the proposed team collectively meet the qualifications?

Refer to the State's response to Question #14

25. Section 2.2 (page 7 of 89) states, "For purposes of this IV&V for the CSEP system, the following staffing units, numbers, and locations are applicable" Does the State foresee a need/desire for IV&V staff to travel to other locations outside of Carson City?

At this time the State does not anticipate the need to travel to other locations.

26. Section 2.3 (page 9 of 89) states, "The IV&V vendor will provide IV&V services for the concurrent CSE System Replacement Project (the Replacement Project). The Replacement Project includes State staff, an implementation vendor, a PMO vendor, a Quality Assurance vendor, and contracted staff augmentation." Please clarify what "concurrent" means in its usage here.

This refers to the PMO, DD&I, and QA components of the Replacement Project.

27. Section 3.1.2 (page 13 of 89) states, "The vendor will perform all IV&V responsibilities defined in this RFP throughout the term of the contract. The vendor is expected to actively participate in all meetings and to contribute IV&V expertise to all phases of the State's Child Support Enforcement (CSE) System Replacement Project (the Replacement Project)." Please clarify the expectations for IV&V (1) "to actively participate in all meetings" and (2) "to contribute IV&V expertise to all phases" of the project. Is it the State's expectation that IV&V will have representation at every project meeting across all phases of the project? Or that IV&V will participate in select meetings across all project phases? Please define specifically which meetings the IV&V is required to attend.

Refer to the State's response to Question #16.

28. Section 3.1.5 (page 14 of 89) states, "The frequency of IV&V oversight services under this procurement, resulting in a report of findings and recommendations has been determined to be Semi-Annual. Any bidder whose proposal suggests a constant presence on or within the Replacement Project will likely find their costs unnecessarily higher than those of a bidder who proposes to accomplish the same mission (from IV&V review initiation to final report delivery and presentation) within the otherwise defined, periodic timeframe of semi-annual." Section 3.1.5 appears to conflict with Section 3.1.2 (see above). The latter discourages a constant presence whereas the former appears to encourage active participation on a daily basis. Please clarify the State's intent regarding IV&V involvement with the project.

Refer to the State's response to Question #16

29. Section 3.1.10 (page 16 of 89) (and also Sections 12.3.4.1 and 12.3.4.6 (page 67 of 89)) states " IV&V services will be performed periodically, through performance of semi-annual IV&V reviews, as part of a larger oversight role of the day-to-day operations and management of the Replacement Project by State and Federal entities. ... The IV&V Service Provider shall have access to all key staff on site at the State's Replacement Project location(s) daily, as needed to observe meetings, review deliverables and documentation, conduct interviews, etc., in order to ensure a high level of integrity and confidence in the IV&V Service Provider's State's Replacement Project oversight and monitoring. The contractor shall be required to have its project management located in Carson City for the duration of the project. The State shall provide space for four (4) contractor personnel. If additional space is required, the space selected by the contractor shall be mutually agreed upon by the State." Section 3.1.10 appears to conflict with Section 3.1.5 while appearing to be more consistent with Section 3.1.2 (see above). Sections 3.1.2 and 3.1.10 appear to encourage active participation on a daily basis, whereas Section 3.1.5 discourages a constant presence. Sections 12.3.4.1 and 12.3.4.6 also seem to provide conflicting information.

Will the State please clarify the intent regarding level of IV&V involvement with the project, in regard to maintaining a daily monitoring roll or a periodic monitoring presence? Please also clarify the State's expectations regarding IV&V staff working onsite or offsite/remote.

Refer to the State's response to Question #16. The State expects the IV&V vendor to be onsite to conduct semi-annual reviews.

30. Section 3.2.4.5 (page 18 of 89) states, "Provide a risk management assessment and capacity planning services." Please clarify the State's expectations for capacity planning services. What is the State seeking in terms of outcome(s)?

The vendor should determine what is needed to meet the goals, objectives and requirements and propose an appropriate solution.

31. Section 3.2.4.7, J (page 18 of 89) states, "Inventory and review the application software for completeness and adherence to programming standards for the State's Replacement Project." Please clarify the State's expectations with "Inventory and review the application software for completeness and adherence to programming standards" for the replacement project. What is the State seeking in terms of outcome(s)?

Refer to the State's response to Question #30.

32. Deliverable 3.5.2.2 (page 26 of 89) requires, "Attendance at all scheduled meetings." Please clarify the State's intent by "attendance at all scheduled meetings." Please define specifically which meetings the IV&V is required to attend.

Refer to the State's response to Question #16

33. Section 3.6.2.1 (page 27 of 89) and Section 3.6.2.3 (page 29 of 89) required that "The IV&V Service Provider will be restricted to conducting its onsite review within a 10-calendar day period." Does the State mean within a 10-business day period? (If calendar days, then 8 business days would be the max possible.) Please explain what the State wishes to achieve by imposing this limit.

The State is adhering to federal requirements as per the IV&V Statement of Work Template located at https://www.acf.hhs.gov/css/resource/ivv-statement-of-work-template.

34. Section 3.6.2.7 (page 31 of 89), regarding Archive documents, states, "A complete CD-ROM archive of all IV&V Documents including draft and final reports, status briefings, exception reports, all versions of the Project Management Plan, Deliverable Observation Review (DOR) Reports, Monthly (Financial) Invoicing, Project Status Reports, and all project materials, documentation, artifacts, data, reports, forms, etc., collected by the IV&V Service Provider during the course of their latest IV&V Review. This complete archive is to be submitted with the respective final invoice for the IV&V Review period in question." Please clarify if the expectation is that this be submitted semi-annually, together with the IV&V Review Report, or at final project close?

This complete archive is to be submitted with the respective final invoice for the IV&V Review period in question.

35. Section 3.6.3.2 (page 32 of 89) regarding Requirement Description states:
- (see 5.4.2.1 for more details)
- (see 5.5.2.1 and 5.5.2.2 for more details)
- (see 5.5.2.3 and 5.5.2.4 for more details)
- (see 5.5.2.5 for more details)

These references are not found within this RFP. We have made an effort to interpret. Please confirm our interpretation / cross-references are correct:

- 5.4.2.1 = 3.5.1.1
- 5.5.2.1 and 5.5.2.2 = 3.6.2.1 and 3.6.2.2
- 5.5.2.3 and 5.5.2.4 = 3.6.2.3 and 3.6.2.4
- 5.5.2.5 = 3.6.2.5

The references provided above are correct. Section 3.6.3.2 IV&V Project Management is revised as follows:

REQUIREMENT ITEM	REQ #	REQUIREMENT DESCRIPTION
IV&V Management Plan	**IM-1**	As the first deliverable the IV&V provider shall develop an IV&V Management Plan. This plan shall describe the activities, personnel, schedule, standards, and methodology for conducting the IV&V reviews. (see 3.5.1.1 for more details)

REQUIREMENT ITEM	REQ #	REQUIREMENT DESCRIPTION
Conduct Initial Review	**IM-2**	Prepare and deliver an Initial IV&V report on the required activities. Report on status of each activity. (see *3.6.2.1* and *3.6.2.2* for more details)
Conduct Periodic Review(s)	**IM-3**	Prepare and deliver a Follow-up IV&V report on the required activities. Report on status of each activity and progress since the previous report. (see *3.6.2.3 and 3.6.2.4* for more details)
Management Briefing	**IM-4**	Prepare and deliver a formal presentation(s) on the status of the IV&V project. Presented as required, with at least ten (10) business days' notice. No more than once a month. (see *3.6.2.5* for more details)

36. Section 12.3.4.6 (page 67 of 89) states, "The State shall provide space for four (4) contractor personnel. If additional space is required, the space selected by the contractor shall be mutually agreed upon by the State." Please clarify if this space is available for four IV&V staff on a permanent, daily basis throughout the life of the contract. If not, please clarify the State's intent in providing this space.

    The State will provide space for four (4) contractor personnel as needed to meet the goals, objectives and requirements of this solicitation.

37. Section 1. (pg. 4) states, "The resulting contract will be administered by an independent Contract Officer and will be for a contract term of six (6) year(s);" Who is the contracting officer for the IV&V contract?

    Refer to the State's response to Question #5.

38. Section 3.2.3 states, "Vendor's response must be limited to no more than five (5) pages per task not including appendices, samples and/or exhibits." Will the State please define what it regards as a task as opposed to an activity. Are the tasks listed as the items in 3.2.11.2 and 3.2.11.3?

    Refer to the State's response to Question #13.

39. Section 3.1.11.1 (pg. 16) states, "Attend requested IV&V project meetings and Steering Committee meetings." Will the State please provide detail on how often the steering committee meets?

    Refer to the State's response to Question #56.

40. RFP Section 10.2.2.5 states that bidders should respond to System Requirements in Section V of the proposal response. Can the State please clarify which section of the RFP contains the System Requirements?

    Refer to the State's response to Question #22.

41. RFP Section 10.2.2.6 states that bidders should respond to RFP Section 4, Scope of Work, in Section VI of the proposal response. The Scope of Work is in Section 3 of the RFP. Section 3.2 of the SOW, Vendor Response to the Scope of Work, states that "Vendors must provide information regarding their approach to meeting the requirements described within Sections 4.4

through 4.6." Can the State please clarify which sections of RFP Section 3, Scope of Work, require a response?

Section 10.2.2.6 is revised as follows:

Vendors shall place their written response(s) to Section 3, Scope of Work in bold/italics immediately following the applicable RFP question, statement and/or section.

Section 3.2.1 is revised as follows:

Within the proposal, vendors must provide information regarding their approach to meeting the requirements described within Sections 3.4 through 3.6.

42. RFP Section 3.6.2.6 states, "Create Deliverable Observation Reports (DOR) as necessary. If desired and requested by the Replacement Project team, CSEP, and DWSS, the IV&V Service Provider will prepare and deliver a one-time, focused, specific Deliverable Observation Report to the IV&V Contract Officer (for delivery to the State Replacement Project, etc.,) and OCSE, at the same time, presenting an analysis of a prescribed deliverable or other task not specifically referenced by this scope of work. Examples of such focused Deliverables Observation Reports include: a network capacity, bandwidth, and throughput analysis; independent analysis of compliance of a project deliverable with contract specifications, etc. The Replacement Project team, CSEP, and DWSS may receive a debriefing on the results of such a DOR from the IV&V Service Provider only with the concurrence and attendance of OCSE." Please clarify if the Deliverable Observation Reports (DOR) are only "upon request" and thus will be scoped and priced separately if/when the State were to make this request of IV&V.

The Deliverable Observation Reports (DOR) are included in the project budget and should not be priced separately.

43. RFP Section 5.1 states in several places that "... detailed backup for all cost schedules shall be provided ..." Can the State please clarify what constitutes acceptable detailed backup?

Detailed backup includes but is not limited to any details that clearly define how the vendor derived the cost for each line item.

44. Attachment I, Project Costs includes such terms as "attendance at all scheduled meetings", "Periodic IV&V Reviews", and "Deliverable Observation Reports" the cost of each of which requires knowledge of the frequency of each deliverable. Can the State please provide an estimate of the frequency of each line item so that all vendors are bidding on the same scope of work?

Refer to the State's response to Question #30.

45. What is the estimated number of stakeholders the IV&V vendor would be responsible for interviewing?

Refer to the State's response to Question #30.

46. Can the IV&V vendor assume that all project activities would be conducted in Carson City, or will there be a requirement to conduct some of the IV&V activities in other areas of Nevada, requiring travel outside of Carson City?

Refer to the State's response to Question #25.

47. Would the State please verify that the CSE Replacement Project is intended to primarily be an application development effort (instead of a project to acquire a Commercial Off the Shelf (COTS) or Modifiable Off the Shelf (MOTS) package product implementation). If this assumption is accurate, would the State please describe the system development life cycle (SDLC) methodology that they anticipate using for this initiative (i.e., Waterfall, Agile, Hybrid, other)

The CSE Replacement Project will be a transfer system, the system development life cycle methodology will be determined by the selected vendor with concurrence by the State.

48. For purposes of proposal evaluation (technical proposal and cost proposal), can we assume that the Replacement Project will continue through the stated contract term of April 30, 2024?

Yes.

49. Section 2.3 Concurrent Impacts/Projects: Please elaborate on what is meant by "concurrent CSE System Replacement Project" in the first sentence of this section.

Refer to the State's response to Question #26.

50. Section 2.3 states "In addition to the Implementation Contractor which is the subject of this RFP, the Program will be procuring the following contractor services…" Please clarify that the "subject of this RFP" is IV&V services.

The subject of this RFP is IV&V services. Sections 2.3 is revised as follows:

amend 1 attachment.docx

51. Section 2.3.1.3 describes IV&V services, which we believe is the subject of this RFP. Can we assume that they meant to include the Implementation Contractor description in this section instead of IV&V.

Refer to the State's response to Question #50.

52. Section 2.3.1 references the term "NCSEAS" four times in this section. Please define this term (or should this term be replaced by "the Replacement Project."

Refer to the State's response to Question #50.

53. Section 2.5 Project Software lists the tools to be used for project management. Must the awarded IV&V vendor have all of these tools for use during the project, or would the State provide relevant data residing within the tools (specifically, Work item Tracking Tool and Bugzilla)?

The State must approve all software.

54. Section 2.6.2 of the RFP describes the role of Project Sponsor. Would the State please describe the relationship between the Project Sponsor and the State's IV&V Contract Officer?

Refer to Section 1, paragraph 6 of the RFP.

55. Section 3.1.8. Would the State verify that the stakeholder group involved in IV&V activities (e.g., for interviewing, observation, etc.) is limited to the following groups listed in this section: State's Replacement Project management staff, CSEP staff, and the State's Replacement Project vendor staff (including any sub-contractors)? If not, would the State please list other stakeholders with which the IV&V vendor will be asked to engage?

Section 3.1.8 does not refer to a stakeholder group.

56. 12. Section 3.1.11.1 Planning and Administration. This section lists IV&V tasks and activities, including attendance at various meetings. Would the State please verify that these activities are to take place during each 10-week Semi-annual assessment period only, and not during months in which IV&V is not actively engaged? (Note: Section 3.5.1.4 is clear that providing written monthly status reports are during active work only.) Additionally, can the State estimate the number of Steering Committee meetings would be held each month, and what IV&V's role would be in those meetings?

The activities in section 3.1.11.1 are required during each semi-annual assessment period and not during inactive periods. The Steering Committee currently meets on a monthly basis. Steering Committee meetings may increase in frequency based on project needs. The IV&V vendor is invited to attend Steering Committee meetings during semi-annual review periods.

57. 13. Section 3.5.1.2 indicates that IV&V will "attend monthly project status meetings." Would the State please verify that these activities are to take place during each 10-week semi-annual assessment period only, and not during months in which IV&V is not actively engaged?

Refer to the State's response to Question #16.

58. Section 3.5.1.3 indicates that IV&V will "attend and participate in all IV&V project related meetings requested, as well as Steering Committee meetings." Would the State please verify that these activities are to take place during each 10-week semi-annual assessment period only, and not during months in which IV&V is not actively engaged? Can the State estimate the number of Steering Committee meetings would be held each month, and what IV&V's role would be in those meetings?

Refer to the State's response to Question #56.

59. Section 3.6.2.5 indicates that the IV&V vendor would 'Conduct formal briefing presentations to the DWSS, CSEP, Replacement Project, and OCSE on the Respective IV&V Review Report.' However, Section 3.6.2.2 (the last paragraph in subsection E) does not include this language. Please verify that they would value form briefing presentations for the Initial IV&V Review Report as well as subsequent ones.

Yes.

60. Section 3.6.2.6. Since the creation of Deliverable Observation Reports (DOR) are "as necessary"; and since the scope (size, effort involved) for each DOR is unknown, can we assume that the rate table within the Cost Proposal will be used for each of these, when needed? What assumptions about the number of DORs and the size and complexity of deliverables should we use to price Deliverable 3.6.4.6?

Refer to the State's response to Question #42.

61. Section 3.6.3.2 includes a table of IV&V Project Management requirements; including a requirement entitled "Management Briefing." Would the State please verify that these would only be required during active work only?

Management briefing is required during the semi-annual IV&V review period.

62. Section 12.3.4 indicates that "the contractor shall be required to have its project management located in Carson City for the duration of the project." Is this statement accurate for this project? Must the awarded IV&V vendor have a physical office presence in Carson City? Other subsections of Section 12.3 seem more relevant to the application development vendor, and not the IV&V vendor. If this is the case, as a proposing IV&V vendor, can we just assume that these subsections are not relevant to us, or would the State consider removing the non-relevant elements?

Refer to the State's response to Question #16.

63. Section 4.1, where should we include responses to this section within our proposal?

Response to section 4.1 should be included in 10.2.2.7 Section VII – Company Background and References. Section 10.2.2.7 is revised as follows:

Vendors shall place their written response(s) to ***Section 4, Company Background and References*** in ***bold/italics*** immediately following the applicable RFP question, statement and/or section. This section shall also include the requested information in ***Section 4.2, Subcontractor Information***, if applicable.

64. Throughout the RFP, there seems to be incorrect references (e.g. Section 4 it refers to "Section 4, Scope of Work" while Section 3 is named Scope of Work). Can you confirm these are incorrect and provide updated references as necessary?

References to Section 4, Scope of Work, should read as "Section, 3 Scope of Work".

65. Section 3.2.3 of the RFP states the "Vendor's response must be limited to no more than five (5) pages per task not including appendices, samples and/or exhibits." Can you please confirm a task is defined as the tasks defined in Section 3.1.11 – 3.1.11.1 Planning and Administration and 3.1.11.2 IV&V Activities?

Refer to the State's response to Question #13.

66. P. 13 of the RFP mentions, section 3.6.2.6 which states the IV&V vendor must "Create Deliverable Observation Reports (DOR) as necessary." Can you estimate the number of DORs that will be provided through the duration of the project?

Refer to the State's response to Question #42.

67. Section 4.1 of the RFP defines vendor information that must be provided, however the Submission Checklist only includes the "Vendor Information Sheet" which does not include all of the required information. Can you advise as to where this information should be provided?

Refer to the State's response to Question # 63.

68. P. 67, Section 12.3.4 of the RFP states the contactor shall be required to have its project management located in Carson City. In section 3.1.5 the RFP outlines that a "constant presence on or within the Replacement Project will likely find their costs unnecessarily higher." Would the State clarify what is required? Is it project management work must be done in Carson City? Or is the State requiring that the vendor must establish a project office in Carson City and include the costs of this in the fixed price proposal? Please advise.

Refer to the State's response to Question #16.

69. P. 71, section 12.3.11 of the RFP discusses source code. Can vendors assume this does not apply to the scope of the IV&V engagement?

This section applies to more than source code, and does apply to the scope of the IV&V engagement. Any documents, special tools created throughout the process, etc. are the property of the State of Nevada.

70. Section 1.3 of the RFP outlines the IV&V vendor cannot bid on subsequent contracts related to the Child Support Enforcement System Replacement Project. Is the incumbent vendor(s) that has supported the planning, requirements, IAPD, RFP and procurement effort for the CSE system allowed to bid on this RFP?

Yes, the vendor that supported the planning, requirements, IAPD and RFP effort is precluded from award of the IV&V Services contract.

71. Section 3.1.2 states "The vendor is expected to actively participate in all meetings and to contribute IV&V expertise to all phases of the State's Child Support Enforcement (CSE) System Replacement Project". This appears to conflict with the statements in the RFP including section 3.1.5. Is Section 3.1.2 intended to apply only to those meetings determined to require IV&V attendance to support the IV&V Plan?

Refer to the State's response to Question #16.

72. In general, the requirements in section 3.6.3 of the RFP define the IV&V vendor's role is to evaluate, verify or validate the project team's performance. A few of the requirements request the vendor determine or evaluate (e.g. requirement DM-3, ST-2 and SD-12) project related metrics. Please clarify whether the State expects the vendor to perform additional activities to address these requirements. For example, to meet requirement DM-3 "Determine conversion error rates and if the error rates are manageable" does the vendor need to provide tools to analyze the data to determine and measure error rates or does the vendor need to evaluate/verify/validate the error rates and determine if the error rates are manageable.

The IV&V vendor must use federal guidelines to determine the appropriate methodology.

73. Sections 4.10, 4.11, 4.12, and 4.13 all revolve heavily around system development processes/activities and not IV&V assessment/review activities. Can the State confirm that these sections are relevant to the IV&V contractor?

Sections 4.10 Design and Development Processes, 4.11 Configuration Management, 4.12 Peer Review Management and 4.13 Project Software Tools are not applicable to this solicitation. However, the IV&V vendor should verify and report that work is progressing and deliverables are produced in a timely manner. How verification and reporting occurs is the responsibility of the selected vendor.

74. Can the State confirm the onsite requirement for this project as section 12.3.4.1 states, 'The contractor shall be required to have its project management located in Carson City for the duration of the project?' This approach does not appear to be consistent with conducting periodic reviews.

Refer to the State's response to Question #16

75. Sections 12.3.11 Source Code Ownership and 12.3.13 Guaranteed Access to Software refer to activities, processes, tools, etc. that are specific to a development contractor. Can the State confirm that these items should apply to the IV&V contractor?

Refer to the State's response to Question #69.

76. Will the State provide an estimated / maximum budget for this project, in order to provide additional guidance for the scope of services to be provided by the IV&V vendor?

Refer to the State's response to Question #1.

77. Section 3.5.1.4 states "Provide written monthly status reports no more than once a month during active work conducting a semi-annual (Initial or Periodic) IV&V Review..." Can the State please clarify what is meant by the term "active work?" Does the State expect monthly reports during and immediately following Initial / Periodic reviews, or does the State anticipate monthly reports regularly throughout the duration of the IV&V contract?

The State anticipates monthly reports during the semi-annual IV&V review periods. Refer to the State's response to Question #1.

ALL ELSE REMAINS THE SAME FOR RFP 3475.

Vendor must sign and return this amendment with proposal submitted.

Vendor Name: ***FusionSTO***

Authorized Signature: Mary G James

Title: ***Chief Operating Officer*** Date: ***9/27/17***

This document must be submitted in the "State Documents" section of vendors' technical proposal.

State of Nevada
Department Administration
Purchasing Division
515 E. Musser Street, Suite 300
Carson City, NV 89701

Brian Sandoval
Governor

Jeffrey Haag
Administrator

SUBJECT:	Amendment 2 to Request for Proposal 3475
RFP TITLE:	**Independent Verification & Validation (IV&V) for Child Support Enforcement (CSE) System Replacement**
DATE OF AMENDMENT:	September 29, 2017
DATE OF RFP RELEASE:	August 21, 2017
OPENING DATE:	October 19, 2017
OPENING TIME:	2:00 PM
CONTACT:	Ronda Miller, Procurement Staff Member

The following shall be a part of RFP 3475. If a vendor has already returned a proposal and any of the information provided below changes that proposal, please submit the changes along with this amendment. You need not re-submit an entire proposal prior to the opening date and time.

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1. A clarification question related to the Q&A that came out with the last amendment for RFP #3475 CSE IV&V Services. It appears that in the Q&A that the requirement is for all key staff to have all of the skills required for each position. Can you please confirm our understanding? It would be unusual for all staff to possess all of the experience for each position. Typically the requirement is for staff to have the amount of experience required for their particular specialty.

   The State revises its response to Amendment 1, Question 14 as follows:

   Each IV&V team member must have all of the qualifications listed in sections 4.4.2.1, 4.4.2.2, 4.4.2.3 and 4.4.2.4. The combined qualifications of all team members can be used to fulfill the qualifications listed in sections 4.4.2.5 through 4.4.2.14. However, the experience of different individuals cannot be combined to meet a particular qualification.

   NOTE: The qualifications under sub-sections 4.4.2.15 and 4.4.2.16 are duplicates of the qualifications under sub-sections 4.4.2.10 and 4.4.2.11. Consequently, sub-sections 4.4.2.15 and 4.4.2.16 are hereby <u>deleted</u>.

2. Would the State consider giving a two week extension of the proposal due date, to allow for ample time to incorporate all questions and answers into responses?

   No. Due to time constraints, the State must adhere to the timeline provided in the RFP.

3. Amendment 1 – Questions #14 and #24
   Can you please confirm our understanding of the responses to these two questions? Do all key staff have to have all of these skills required for each position? It would be unusual for all staff

to possess all of the experience for each position. Typically, the requirement is for staff to have the amount of experience required for their particular specialty.

Refer to the State's response to Question #1.

4. In the State's response to Question 14 in Amendment 1, clarification was made that "Each IV&V team member must have all of the qualifications listed in Section 4.4.2 Individual Verification Services Team Member Qualifications." We respectfully request the State reconsider their response. As an experienced provider of IV&V services with the knowledge of the skills sets required to meet and exceed OCSE IV&V standards we understand the need for expertise and experience in several disciplines, including:
   - IV&V of Child Support Systems
   - Technical Expertise including Technical Architectures
   - Child Support Business Functions
   - OCSE Certification

Refer to the State's response to Question #1.

5. Meeting your requirements requires a well-balanced team that collectively can address all the focus areas of a CSE implementation and certification. In our experience it is unlikely that every member of an effective IV&V team would have both technical and business expertise. For example requiring all IV&V team members to have experience in assessing "*training plans involving the development of course outlines and materials and organizing and conducting classes to support the implementation of new business processes and systems*" would, in our experience, be a very rare skill set in persons who are experienced in "*the implementation of secure Internet applications.*"

Refer to the State's response to Question #1.

6. The requirement that all team members have all of the qualifications listed in Section 4.4.2 Individual Verification Services Team Member Qualifications versus the collective team, will have the unintended consequences of limiting competition, needlessly increasing costs and restricts the ability for the State to receive the best value for the services requested in the RFP.

Refer to the State's response to Question #1.

7. Section 4.4.2 uses the phrase "Completed at least one (1) project within the past three (3) years" on five of the Team Member Qualifications. We interpreted the term "completed" in this phrase as the Team Member completed their duties on such a project within the three year period, rather than the project was completed, i.e. system is in production and the IV&V contract is expired. As Nevada knows, there have been very few CSE statewide system projects in the last 3 years. Requiring that for these five requirements, especially requirement "*4.4.2.4 Completed at least one (1) project within the past three (3) years that involved the receipt, installation, operation and maintenance of computer equipment and software for a Child Support Enforcement or similar large systems*", would be extremely difficult for any IV&V vendor or IV&V practitioner to meet. We respectively ask the State to clarify their requirements in relation to this term.

Refer to the State's response to Question #1.

8. SECTION IV

Section 10.2.2.4 requests vendors attach "copies of any vendor licensing agreements and/or hardware and software maintenance agreements" and "Copies of applicable certifications and/or licenses" in Section IV – State Documents. Is Nevada aware of any additional documents that are required (which are not already listed in the instructions and/or included as Attachments)?

No.

9. SECTION V

Please confirm vendors should remove Section V "System Requirements" from their proposals (e.g. it has been removed from the Submission Check List (Section 13) and Section 10.2.2.5 has been removed)?

If Section V "System Requirements" has been removed, how should vendors number the subsequent sections?

Refer to attached updated submission checklist.

SUBMISSION CHECKLIST.docx

10. SECTION VI

Section 3.6.2.6 outlines that Deliverables Observation Reports (DORs) will be developed "as needed". Is it the State's expectation that these will be produced as needed to produce the IV&V reports or that they are produced for each deliverable other vendors provide?

Per the attached updated submission checklist in question 9 of this amendment, Section VI – Scope of Work is now Section V.

The State revises the response to Amendment 1, Question 42 as follows:

The State requires a minimum of two (2) Deliverables Observation Reports (DORs). If the proposer deems it would be beneficial to the Project, they can propose additional DORS as an optional service. The costs for the two (2) required DORs should be listed on Tab 5.1.1 of the Cost Schedule under deliverable number 3.6.4.6.

11. Vendor costs will vary significantly based on the number of DORs the State requires. Can the State provide some guidance regarding the number of DORs they will require (e.g. one per deliverable produced by the DDI vendor or as requested, with the expectation to be ~10% of all deliverables produced?)

Refer to the State's response to Question #10.

12. Section VI Scope of Work - Please confirm vendors do not need to respond directly to Sections 3.1 – 3.3

Per the attached updated submission checklist in question 9 of this amendment, Section VI – Scope of Work is now Section V.

The proposer must respond to sections 3.1 through 3.3 by specifying whether they can comply with the terms of those sections.

13. Section VI Scope of Work - What level of the RFP does the State expect the vendors to respond to In Sections 3.4 through Section 3.6? For example, should vendors provide a response to Section 3.4, "Project Kick-Off Meeting" or should vendors provide responses to each sub section such as Section 3.4.3, "Determining format for the project status report"

    Per the attached updated submission checklist in question 9 of this amendment, Section VI – Scope of Work is now Section V.

    Vendors shall place their written response(s) to Section 3, Scope of Work in bold/italics immediately following the applicable RFP question, statement, section, and/or sub section.

14. Many of the sections/sub-sections within section 3.4 through 3.6 are requirements (the vendor must) rather than questions. Can you please confirm whether vendors should respond to each section within Section 3.4 through 3.6?

    Yes, the proposer must respond to sections 3.4 through 3.6 and specify whether they can comply with the terms.

15. Section 3.2.3 state "Vendor's response must be limited to no more than five (5) pages per task not including appendices, samples and/or exhibits." This was clarified in the first round of questions and answers to mean "***The five (5) page limit applies to each task, sub-task, service, or activity in the RFP, including those associated with deliverables. If additional pages are needed for a particular task, the five (5) page limit can be applied to all tasks in the RFP as an overall average.*** However, Section 10.1.10 states "written responses shall be in bold/italics and placed immediately following the applicable RFP question, statement and/or section." Does this mean 5 pages per task, sub-task, service or activity per RFP question? Please clarify.

    Yes, this means 5 pages per task, sub-task, service or activity.

16. The instructions seem to request vendors provide Project Plan information in Section VI of our response (in responding to Section 3.5) and requests information related to the project plan in Section IX of our response (in responding to Section 4.6). Please clarify where these should be provided.

    Is Section VI supposed to provide an overview of the approach and Section IX provide the plan for managing the engagement?

    Section 4.6 requires a Preliminary Project Plan to be included in the vendor's proposal whereas section 3.5 requires a Detailed Project Plan as a Planning and Administration activity to be delivered by the selected IV&V vendor.

    Vendors should refer to the attached updated submission checklist in questions 9 of this amendment to ensure responses are submitted in the correct sections.

17. SECTION VII
    Section 10.2.2.7 requests "written response(s) to ***Section 5, Company Background and References in bold/italics".*** Please confirm this is referring to Section 4 and should only

include responses to questions in Section 4.1-4.3 (As sections 4.4 and above are included in other sections). If not, please provide clarifications.

Per the attached updated submission checklist in question 9 of this amendment, Section V II –Company Background and References is now Section VI.

Responses to sections 4.1 through 4.5 should be included under Section VI, Company Background and References. Refer to Amendment 1, Question 63.

18. Section 10.2.2.7 requests "This section shall also include the requested information ***in Section 5.2, Subcontractor Information***, if applicable." Please confirm this is referring to Section 4.2 and should only include responses to questions in Section 4.2. If not, please provide clarifications.

    Yes. Refer to Amendment 1, question 63.

    Vendors should refer to the attached updated submission checklist in questions 9 of this amendment to ensure responses are submitted in the correct sections.

19. Section 10.2.2.7 requests "This section shall also include the requested information ***in Section 5.2, Subcontractor Information***, if applicable." Do the questions (e.g. the text from Section 4.2 and the subsections need to be included in the proposal if the vendor is not including subcontractors in their proposals?

    Refer to the State's response to Question #18.

20. Section 10.2.2.7 requests "Vendors shall place their written response(s) to ***Section 5, Company Background and References*** in ***bold/italics*** immediately following the applicable RFP question, statement and/or section. Assuming this includes Section 4.3 of the RFP, is the State requesting we provide a response to every section/bullet in this section (e.g. Sections 4.3.1, 4.3.2.1 – 4.3.2.16, through 4.3.5) or can we simply provide the names of the references provided? If Nevada requires a response to each section/bullet, what is Nevada's expectations for these responses?

    Vendor should list who they sent their reference questionnaires to for completion.

21. SECTION VIII
    Section 10.2.2.8, A requests "A. Vendors shall include all proposed staff resumes per ***Section 5.5, Vendor Staff Resumes*** in this section. Please confirm this is referring to Section 4.5.

    Per the attached updated submission checklist in question 9 of this amendment, Section VIII – Attachment H – Proposed Staff Resume(s) is now Section VII.

    Section 10.2.2.8 is revised as follows:

    Section VII – Attachment H – Proposed Staff Resume

    A. Vendors shall include all proposed staff resumes per Section 4.5, Vendor Staff Resumes in this section.

B. This section shall also include any subcontractor proposed staff resumes, if applicable.

22. Section 10.1.10 requires "written responses shall be in bold/italics placed immediately following the applicable RFP question, statement and section". Does Section VIII require responses to both Section 4.4 and 4.5 or only 4.5 (e.g. no response is required to Section 4.4, simply the references must align with these qualifications)?

Per the attached updated submission checklist in question 9 of this amendment, Section VIII – Attachment H – Proposed Staff Resume(s) is now Section VII.

Section VII requires responses to both Section 4.4 and 4.5.

23. Section 4.5 refers to Section 13.3.19, Key Personnel in relation to the identification of key personnel. Section 13.3.19 does not exist. Please provide guidance as to who are considered key personnel.

Section 4.5 is revised as follows:

VENDOR STAFF RESUMES

A resume shall be completed for each proposed individual on the State format provided in Attachment H, Proposed Staff Resume, including identification of key personnel per Section 12.3.18, Key Personnel.

24. If Section VIII requires responses to each section and sub-section, at what level should the responses be provided? For example, should vendors respond to Section 4.4.1 or provide a response to 4.4.1.1 through 4.4.1.6?

The proposer should respond to each section or sub-section as they deem appropriate. Refer to the State's response to Question #25 for an example.

25. SECTION IX
Section 10.1.10 requires "written responses shall be in bold/italics placed immediately following the applicable RFP question, statement and section". Does this apply to Section IX of the response or does the State simply require a preliminary project plan, which addresses the requirements captured in the RFP, be provided? In other words, do vendors need to respond to every sub-section in Section 4.6, Preliminary Project Plan, 4.7 Project Management, 4.8 Quality Assurance and 4.9 Quality Metrics?

Per the attached updated submission checklist in question 9 of this amendment, Section IX – Preliminary Project Plan is now Section VIII.

The proposer should respond to each section or sub-section as they deem appropriate. For example, the proposer should include all of the requirements of sub-sections 4.6.1 through 4.6.6 in their proposed Preliminary Project Plan as provided under section 4.6.

26. Please confirm responses to Sections within 4.10, 4.11, 4.12 and 4.13 are not required, though the response must address assessing these areas. If not, please provide detailed expectations of the response in these areas.

Sections 4.10, 4.11, 4.12 and 4.13 are not applicable to this solicitation per the State's response to Amendment 1, Question 7. However, the proposer should address how they will assess each of these areas in their response to these sections.

27. If Section IX requires responses to each Section and sub-section, at what level of the outline (sections or sub-sections) should the vendors respond to? In other words, do vendors need to provide a response to 4.6 or include a response to 4.6.1 through 4.6.6?

    Refer to the State's response to Question #25.

28. COSTWORKBOOK
    The cost workbook only includes costs for the Planning and Administration activities (Section 3.5) and IV&V Activities (Section 3.6) but does not include any cost regarding the project Kick Off (Section 3.4).

    If the vendor deems it necessary, a separate cost for the kick off meeting can be included on Tab 5.1.2, Other Associated Costs.

29. The cost workbook includes a single price for the deliverable, even though many of the deliverables will be produced multiple times. Should vendors provide the extended price (cost to create one deliverable multiplied by the number of times that the deliverable needs to be produced) or the single price?

    Refer to section 5.1 of the Cost Schedule.

30. If Nevada is requesting the extended price be included in the cost workbook, how many IV&V reports should vendors assume need to be produced?

    Refer to the RFP, section 3.1.5 which states, "The frequency of IV&V oversight services under this procurement, resulting in a report of findings and recommendations has been determined to be Semi-Annual."

31. Could you provide an updated cost workbook which captures both the individual and extended price and captures the costs for kick-of activities, so it is aligned with the SOW?

    Refer to the State's response to Question #28.

32. In the previous answers you answered the question "*Section 1.3 of the RFP outlines the IV&V vendor cannot bid on subsequent contracts related to the Child Support Enforcement System Replacement Project. Is the incumbent vendor(s) that has supported the planning, requirements, IAPD, RFP and procurement effort for the CSE system allowed to bid on this RFP?*" by stating "***Yes, the vendor that supported the planning, requirements, IAPD and RFP effort is precluded from award of the IV&V Services contract.***" This seems to be contradictory (yes, in response to the question whether they are allowed to bid and stating they are precluded from award…). Please confirm whether the incumbent vendor can bid or not.

    The vendor that supported the planning, requirements, IAPD and RFP effort is precluded from award of the IV&V Services contract.

33. Given the number of changes and questions regarding the proposal format, could Nevada provide an enhanced version of Section 10.2.2 which clearly captures the expectations for the

format of the Technical Proposal including the specific questions vendors should respond to? This will likely ease the evaluation process as vendors will submit similar information, decrease the likelihood of a protest.

Refer to attached updated Proposal Submission Checklist.

PROPOSAL
SUBMISSION REQUIRE

34. Given the number of questions and the delay in responding to the first set of questions will the State extend the deadline?

Refer to the State's response to Question #2.

35. Staff qualification 4.4.2.13 asks for five years of conversion experience in a 'lead' role. In general, IV&V practitioners do not 'lead' data conversion. Would the State consider removing the 'lead' role condition from this requirement and/or reducing the years of experience to 3 years instead of 5 years?

Section 4.4.2.13 is revised as follows:

A minimum of five (5) years of experience leading or providing oversight of data cleansing and conversion for a similar-sized project;

36. Staff qualification 4.4.2.14 ask for four years of experience conducting system and user acceptance tests for a similar sized project. Would the State consider removing the 'conducting' condition from this requirement to accommodate IV&V staff who have done direct oversight of testing activities on similar projects.

Section 4.4.2.14 is revised as follows:

A minimum of four (4) years of experience conducting or providing oversight of systems or user acceptance tests for a similar-sized project;

37. Can the State please confirm that team member qualifications detailed in 4.4.2.15 and 4.4.2.16 re duplicates of 4.4.2.10 and 4.4.2.11?

Refer to the State's response to Question #1.

38. RFP Section 3.6.2.6 states, "Create Deliverable Observation Reports (DOR) as necessary. If desired and requested by the Replacement Project team, CSEP, and DWSS, the IV&V Service Provider will prepare and deliver a one-time, focused, specific Deliverable Observation Report to the IV&V Contract Officer (for delivery to the State Replacement Project, etc.,) and OCSE, at the same time, presenting an analysis of a prescribed deliverable or other task not specifically referenced by this scope of work. Examples of such focused Deliverables Observation Reports include: a network capacity, bandwidth, and throughput analysis; independent analysis of compliance of a project deliverable with contract specifications, etc. The Replacement Project team, CSEP, and DWSS may receive a debriefing on the results of such a DOR from the IV&V Service Provider only with the concurrence and attendance of OCSE."

First set of questions included, "Please clarify if the Deliverable Observation Reports (DOR) are only upon request and thus will be scoped and priced separately if/when the State were to make this request of IV&V." Amendment 1 to Request for Proposal 3475 (in response to the first set of questions) communicates that "The Deliverable Observation Reports (DOR) are included in the project budget and should not be priced separately." Amendment 1 also communicates that "The State is adhering to federal requirements as per the IV&V Statement of Work Template located at https://www.acf.hhs.gov/css/resource/ivv-statement-of-work-template." The IV&V Statement of Work template, Task 8.1.10 Deliverable Observation Report (DOR), shows the following requirement/description for this deliverable: "Performed reviews of project artifacts, processes or deliverables not otherwise defined herein this scope of work, as-needed in a special scope of work between State and IV&V Service Provider." The state's response in Amendment 1 that DOR are "included in the project budget and should not be priced separately" appears to conflict with the Federal guideline that state DOR are "in a special scope of work" as-needed.

Refer to the State's response to Question #10.

40. Will the State please clarify the state's interpretation of the Federal guideline for Task 8.1.10 Deliverable Observation Report (DOR) as found in the IV&V Statement of Work template whether it should be included in the budget, or priced separately as needed?

Refer to the State's response to Question #10.

ALL ELSE REMAINS THE SAME FOR RFP 3475.

Vendor must sign and return this amendment with proposal submitted.

Vendor Name: ***FusionSTO***

Authorized Signature: Mary G James

Title: ***Chief Operating Officer*** Date: ***10/9/17***

This document must be submitted in the "State Documents" section of vendors' technical proposal.

ATTACHMENT A – CONFIDENTIALITY AND CERTIFICATION OF INDEMNIFICATION

Submitted proposals, which are marked "confidential" in their entirety, or those in which a significant portion of the submitted proposal is marked "confidential" **shall not** be accepted by the State of Nevada. Pursuant to NRS 333.333, only specific parts of the proposal may be labeled a "trade secret" as defined in NRS 600A.030(5). All proposals are confidential until the contract is awarded; at which time, both successful and unsuccessful vendors' technical and cost proposals become public information.

In accordance with the submittal instructions of this RFP, vendors are requested to submit confidential information in separate files marked "**Part IB Confidential Technical**" and "**Part III Confidential Financial**".

The State shall not be responsible for any information contained within the proposal. If vendors do not comply with the labeling and packing requirements, proposals shall be released as submitted. In the event a governing board acts as the final authority, there may be public discussion regarding the submitted proposals that shall be in an open meeting format, the proposals shall remain confidential.

By signing below, I understand it is my responsibility as the vendor to act in protection of the labeled information and agree to defend and indemnify the State of Nevada for honoring such designation. I duly realize failure to so act shall constitute a complete waiver and all submitted information shall become public information; additionally, failure to label any information that is released by the State shall constitute a complete waiver of any and all claims for damages caused by the release of the information.

This proposal contains Confidential Information, Trade Secrets and/or Proprietary information.

Please initial the appropriate response in the boxes below and provide the justification for confidential status.

Part IB – Confidential Technical Information			
YES		NO	
Justification for Confidential Status			

Part III – Confidential Financial Information			
YES		NO	
Justification for Confidential Status			

FusionSTO

Company Name

Mary G James

Signature

Mary G. James ***10/9/17***

Print Name Date

This document shall be submitted in Section IV of vendor's technical proposal

ATTACHMENT B – VENDOR CERTIFICATIONS

Vendor agrees and shall comply with the following:

(1) Any and all prices that may be charged under the terms of the contract do not and shall not violate any existing federal, State or municipal laws or regulations concerning discrimination and/or price fixing. The vendor agrees to indemnify, exonerate and hold the State harmless from liability for any such violation now and throughout the term of the contract.

(2) All proposed capabilities can be demonstrated by the vendor.

(3) The price(s) and amount of this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other contractor, vendor or potential vendor.

(4) All proposal terms, including prices, shall remain in effect for a minimum of 180 days after the proposal due date. In the case of the awarded vendor, all proposal terms, including prices, shall remain in effect throughout the contract negotiation process.

(5) No attempt has been made at any time to induce any firm or person to refrain from proposing or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal. All proposals shall be made in good faith and without collusion.

(6) All conditions and provisions of this RFP are deemed to be accepted by the vendor and incorporated by reference in the proposal, except such conditions and provisions that the vendor expressly excludes in the proposal. Any exclusion shall be in writing and included in the proposal at the time of submission.

(7) Each vendor shall disclose any existing or potential conflict of interest relative to the performance of the contractual services resulting from this RFP. Any such relationship that might be perceived or represented as a conflict shall be disclosed. By submitting a proposal in response to this RFP, vendors affirm that they have not given, nor intend to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant or any employee or representative of same, in connection with this procurement. Any attempt to intentionally or unintentionally conceal or obfuscate a conflict of interest shall automatically result in the disqualification of a vendor's proposal. An award shall not be made where a conflict of interest exists. The State shall determine whether a conflict of interest exists and whether it may reflect negatively on the State's selection of a vendor. The State reserves the right to disqualify any vendor on the grounds of actual or apparent conflict of interest.

(8) All employees assigned to the project are authorized to work in this country.

(9) The company has a written equal opportunity policy that does not discriminate in employment practices with regard to race, color, national origin, physical condition, creed, religion, age, sex, marital status, sexual orientation, developmental disability or handicap.

(10) The company has a written policy regarding compliance for maintaining a drug-free workplace.

(11) Vendor understands and acknowledges that the representations within their proposal are material and important, and shall be relied on by the State in evaluation of the proposal. Any vendor misrepresentations shall be treated as fraudulent concealment from the State of the true facts relating to the proposal.

(12) Vendor shall certify that any and all subcontractors comply with Sections 7, 8, 9, and 10, above.

(13) The proposal shall be signed by the individual(s) legally authorized to bind the vendor per NRS 333.337.

FusionSTO

Vendor Company Name

Mary B James

Vendor Signature

Mary James ***9/27/17***

Print Name Date

This document shall be submitted in Section IV of vendor's technical proposal

ATTACHMENT J – CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or shall be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federally appropriated funds have been paid or shall be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, sub grants, and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

By: Mary B James — *9/27/17*

Signature of Official Authorized to Sign Application — Date

For: ***FusionSTO***

Vendor Name

IV&V for Child Support Enhancement System

Project Title

This document shall be submitted in Section IV of vendor's technical proposal

Project Management Institute

THIS IS TO CERTIFY THAT

Patricia Barton

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

Mark Dickson • Chair, Board of Directors

Mark A. Langley • President and Chief Executive Officer

PROJECT MANAGEMENT INSTITUTE CORPORATE SEAL 1969 PENNSYLVANIA

PMP® Number: 1882036

PMP® Original Grant Date: 17 December 2015

PMP® Expiration Date: 16 December 2018

PMI® Project Management Institute

Project Management Institute

THIS IS TO CERTIFY THAT

Mary G James

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

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Mark Dickson • Chair, Board of Directors

Mark A. Langley • President and Chief Executive Officer

PROJECT MANAGEMENT INSTITUTE PENNSYLVANIA CORPORATE SEAL 1969

PMP® Number: 501741

PMP® Original Grant Date: 14 December 2007

PMP® Expiration Date: 13 December 2017

PMI® Project Management Institute

Section V – Scope of Work

This section will respond to RFP3475 Table of Contents item 3 – Scope of Work.

V.A Planning and Administration

3.5 PLANNING AND ADMINISTRATION DELIVERABLES			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	***STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
3.5.2.1	Detailed Project Plan	3.5.1.1	15
3.5.2.2	Attendance at all scheduled meetings	3.5.1.2 through 3.5.1.3	N/A
3.5.2.3	Written Monthly Project Status Reports	3.5.1.4	5
3.5.2.4	IV&V Checklists	3.5.1.5 and 3.5.1.6	15

V.A.1 – Deliverable 3.5.2.1 Detailed Project Plan

IV&V Defined

Independent Verification and Validation (IV&V) involves the evaluation by a third party of the work products generated by a Project team that is designing, building or acquiring, testing and implementing technology software. Successful information technology (IT) projects include this independent oversight to assure the acquired software has well-defined requirements, is thoroughly tested against those requirements, ensures users are prepared for the business process changes, and ensures the knowledge transfer to the functional and technical support teams.

IV&V Project Management Plan

The purpose of the IV&V Project Management Plan is to describe how IV&V will be managed throughout the lifecycle of the project. The IV&V Project Management Plan will include an overview of the entire Child Support Enforcement System Project including a summary of the project's phases and deliverables. The IV&V Project Management Plan also includes the activities, vendor personnel, project schedule of IV&V deliverables and the methodology for conducting the initial IV&V Review and Report and subsequent Periodic Reviews and Reports as directed by this RFP and resulting Contract.

IV&V Approach and Methodology

The IV&V services for the Child Support Enforcement System Project (the Replacement Project) will be conducted by FusionSTO based on IV&V guidelines derived from Project Management Institute (PMI) Best Practices, IEEE and CMMI. The methodology applies to all Phases of the project.

FusionSTO's approach and methodology to IV&V services includes assisting the independent IV&V Contract Officer and the Division of Welfare and Supportive Services during each phase of the Replacement Project by:

1. ***Monitoring the Project Management Plan (PMP) and actual project management activities and plans of the PMO, QA and Implementation vendors.***
2. ***Monitoring the Project Schedule to assure milestones are completed according to the schedule, and monitoring the progress of the Replacement Project.***
3. ***Identifying Project Risks and recommending mitigation strategies to reduce those risks.***
4. ***Establishing a broad focused representation of milestones, objectives and critical project issues with recommended solutions if issues arise.***
5. ***Completing independent reviews of Project planning documents and monitoring Project activities in relation to those written plans and schedules.***
6. ***Monitoring the user acceptance testing processes to assure the existing software is thoroughly tested against documented requirements for the revised processes.***
7. ***Working with the Project Team to ensure the end-users are prepared for the business process changes the implementation of the new software will engender.***
8. ***Documenting observations and analyses of the Project, along with recommendations, as deemed necessary, for improvements to the Project to help ensure its successful conclusion.***

Replacement Project Detailed IV&V Project Plan life cycle

The Replacement Project Detailed IV&V Project Plan will be delivered within 30 days of contract signing (May 2018) for Federal OCSE and Nevada Contract Officer review. Feedback will be updated into a final plan for approval prior to beginning the initial onsite review. The Detailed IV&V Project Plan will be in effect for the initial and first periodic review periods. At the conclusion of the first periodic review (approximately March 2019), the Detailed IV&V Project Plan will be updated with a revised schedule, activities and checklists. A revised Plan will be delivered in person as part of a Periodic IV&V Report Formal Briefing Presentation and will be in effect until the next year, pending any significant project risks and/or change orders impacting the overall Replacement Project. This process of updating the Detailed IV&V Project Plan will be annually through the project life cycle and occur within five calendar days of delivering the final version of the Periodic IV&V Review Report.

V.A.2 – Deliverable 3.5.2.2 Attendance at all scheduled meetings

The first scheduled meeting will be the IV&V Kick-Off Meeting where FusionSTO Key Personnel will meet onsite in Carson City with the NV IV&V Contract Officer to review the deliverables of the contract per Section 3.4 of the RFP.

FusionSTO Key Personnel will attend the monthly project status meetings, Steering Committee meetings and any other IV&V project related requested meeting during the bi-annual review periods. Each review period is approximately three months, therefore, attendance at project meetings is planned for six months each year. Attendance will be in-person when meetings are held during the ten-day onsite project team member interviews and will be via video conferencing when not physically present in Carson City. As the selected IV&V vendor, FusionSTO will prepare materials or briefings for the monthly meetings as requested by the State.

V.A.3 – Deliverable 3.5.2.3 Written Monthly Project Status Reports

As the selected IV&V Vendor, FusionSTO will provide to the IV&V Contract Officer a written report at the start of each semi-annual review period, detailing the activities, key personnel and dates planned for the next 60 days. Status updates will occur no more than once per month during active IV&V work. Monthly reports will be submitted the final work day of each of the three months in the Initial and Periodic Review periods.

V.A.4 – Deliverable 3.5.2.4 IV&V Checklists

FusionSTO utilizes standard checklists as fundamental tools during the project reviews. Following is a list of the most commonly used checklists.

Checklist Name	*Checklist Description*
Document Review Checklist	*Used as a checklist for documentation reviews. It is used to determine the overall quality of a document as to readability, utility, correctness, and completeness.*
Project WBS and Schedule Checklist	*Used to determine if critical activities have been planned for in a project's WBS and schedule. This checklist should be applied to the schedule for the project.*
Requirements Review Checklist	*Used to determine whether a set of requirements, design, test, etc., demonstrates that a system satisfies its specified acceptance requirements.*
Preliminary Design Checklist	*Used to assess the top-level design as well as the allocation of requirements to software components. Also used to determine whether the Preliminary Design Review resolved open issues concerning the handling of high-level design requirements.*
Detailed Design Checklist	*Used to determine if all the software requirements have been translated into a viable software design*
Process Review Configuration Management Checklist	*Used to determine whether Configuration Management Procedures document and implement plans for: performing configuration control; providing access to documentation and code under configuration control; and controlling the preparation and dissemination of changes to master copies of software and documentation so they reflect only approved changes.*
Code Review Checklist	*Used to determine whether the software design has been correctly implemented in code that adheres to programming standards and conventions.*
Unit Testing Review Checklist	*Used to determine whether adequate test procedures and test scripts were developed and documented; all necessary revisions to the design documentation and code were made; all necessary retesting was performed; and test results were recorded.*
Test Readiness Review Checklist	*Used to evaluate the Test Readiness Review to ensure that adequate preparations were taken for the performance of System Acceptance Testing.*

FusionSTO is anticipating up to twenty-four unique checklists for the Replacement Project. Checklists will be finalized coinciding with the initial Detailed IV&V Project Plan review and updated each year as part of the Detailed IV&V Project Plan review.

V.B Activities

3.6 IV&V ACTIVITIES DELIVERABLES			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	***STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
3.6.4.1	Initial IV&V Review	3.6.2.1	NA
3.6.4.2	Initial IV&V Review Report	3.6.2.2	15
3.6.4.3	Periodic IV&V Reviews	3.6.2.3	NA
3.6.4.4	Periodic IV&V Review Reports	3.6.2.4	15
3.6.4.5	Formal Briefing Presentations	3.6.2.5	NA
3.6.4.6	Deliverable Observation Reports (DOR)	3.6.2.6	15
3.6.4.7	Document Archive	3.6.2.7	15

V.B.1 – Deliverable 3.6.4.1 Initial IV&V Review

FusionSTO Key Personnel will conduct the initial IV&V review and all periodic IV&V reviews onsite. The meetings will be scheduled three weeks in advance of each review start date with agendas provided two weeks in advance of the review.

The Initial IV&V Review will begin immediately upon approval of the Detailed IV&V Project Plan and checklists applicable to the first full year of the IV&V Project – anticipated to be May 2018 through April 2019. FusionSTO has estimated a June 21, 2018 start date for this deliverable. The subject of the initial review will be the work performed by the PMO and Quality Assurance vendors from the start of the replacement project (approximately October 1, 2017 through May 31, 2018). This initial review will focus primarily on the tasks with target completion dates prior to May 31, 2018 as identified in the PMO Preliminary project plan including:

1. ***Review of the Management Plans, Protocols and Procedures***
    a. ***Detailed Project Plan***
    b. ***Project Governance Plan***
    c. ***Project Schedule Management Plan***
    d. ***Project Meetings and Protocols***
    e. ***Change Control and Issue Management Plan***
    f. ***Risk Management Plan***
    g. ***Scope Management Plan***
    h. ***Cost Management Plan***
    i. ***Staffing Management Plan***
    j. ***Communication Management Plan***
    k. ***Project Control Procedures***
2. ***Review of the PMO and QC vendor Contracts***
3. ***Review of the Master Schedule***
4. ***Review of Organizational Change Readiness Assessment Report***
5. ***Review of the Organizational Change Management Plan***
6. ***Review of Initial Risks***
7. ***Review of Project Management Team Weekly Update Meeting Minutes***
8. ***Review of QA Vendor Status Meeting Minutes and Plans***
9. ***Review of Implementation Vendor Status Meeting Minutes and Plans***
10. ***Review of Semi-Monthly Project Status Reports***
11. ***Review of the Implementation Advanced Planning Document***

FusionSTO, as the selected IV&V Vendor, will participate in project meetings scheduled during the Initial Review and Report period, May, June and July 2018. Attendance will be onsite if the meetings occur during the scheduled onsite visit. Meetings held while not onsite will be attended via teleconference.

FusionSTO key personnel will conduct a series of onsite interviews with Replacement Project stakeholders. The interviews will follow a pre-approved set of questions identified as part of the Initial set of Checklists.

V.B.2 - Deliverable 3.6.4.2 Initial IV&V Review Report

FusionSTO will issue an Initial IV&V Review Report containing the following information:

- ***Overall Project Status***
- ***Overall Project Trend***
- ***Areas Requiring Immediate Attention***
- ***Project Accomplishments***
- ***Highest Risks***
- ***High Level Recommendations***

- ***Detail Report***
- ***Evaluation of Risks identified***
- ***Document Review list***
- ***Document Review Evaluation***
- ***Anonymous Interviewee summary***

The Initial IV&V Review Report will utilize the principles and best practices of Project Management Body of Knowledge (PMBOK) version five.
The implementation Advanced Planning Document will be evaluated for confirmation that the Quality Assurance and Implementation Vendors' project plans will meet the development needs of a Transfer System and evaluation of the State's 'As Is' and 'To Be' processes.

The Initial IV&V Review Report draft version will be delivered simultaneously to the Federal OCSE and the Nevada IV&V Contract Officer for review and comment within 60 days of the start of the onsite review. Comments will be appended to the Report, while mistakes of fact will be corrected and reflected in the final version to meet the deliverable.

V.B.3 - Deliverable 3.6.4.3 Periodic IV&V Reviews

The first Periodic IV&V Review will occur approximately six months from the start of the Initial IV&V review. With a June 21, 2018 Initial IV&V Review start date, FusionSTO proposes that the bi-annual periodic reviews begin immediately following the January 1st and July 4th holidays each year beginning in 2019. The focus of the initial Periodic Review beginning January 2019 will most likely be on the project plans of the QA and Implementation Vendors given their contract start dates of February 1, 2018 and May 1, 2018, respectively. It is anticipated that the following Quality Assurance Vendor deliverables per the QA RFP will be available for review including:

1. ***Technical Approach Plan***
2. ***Business Continuity and Disaster Recovery Plan***
3. ***System Capacity Plan***
4. ***Development Hardware and Software Purchase Plan***
5. ***Development Hardware and Software Configuration Plan***
6. ***Database Development Plan***
7. ***Application Development Plan***
8. ***Ease of Use Management Plan***
9. ***Database Configuration Management Plan***
10. ***Data Governance Plan***
11. ***Release Management Plan***
12. ***Data Conversion Management Plan***
13. ***Test Management Plan***
14. ***Training Management Plan***
15. ***Web-based Training Development Plan***

16. ***Security Management Plan***
17. ***Operations Support Plan***
18. ***Maintenance Transition Plan***
19. ***Warranty Support Plan***
20. ***Functional and Technical Requirements including a Requirements Traceability Matrix***
21. ***Business Process documentation will be available for the first periodic review***

The IV&V review process for the first Periodic IV&V review will be consistent with the Initial IV&V review as the focus will be on documentation and interviews.

Focus areas of all subsequent periodic reviews will be dependent upon the updated Detailed IV&V Project Plan and progress demonstrated by the PMO, QA and Implementation Vendors.

V.B.4 - Deliverable 3.6.4.4 Periodic IV&V Review Reports

FusionSTO will follow the same format as the Initial IV&V Review Report when issuing the first Periodic IV&V Review Report. The report will include:

- ***Overall Project Status***
- ***Overall Project Trend***
- ***Areas Requiring Immediate Attention***
- ***Project Accomplishments***
- ***Highest Risks***
- ***High Level Recommendations***
- ***Detail Report***
- ***Evaluation of Risks identified***
- ***Document Review list***
- ***Document Review Evaluation***
- ***Anonymous Interviewee summary***

The first Periodic IV&V Review Report will continue to utilize the principles and best practices of Project Management Body of Knowledge (PMBOK) version five, CMMI and ITIL. Subsequent Periodic Reviews and Review Reports will incorporate IEEE best practices and standards when appropriate.

The Periodic IV&V Review Report draft version will be delivered simultaneously to the Federal OCSE and the Nevada IV&V Contract Officer for review and comment within 60 days of the start of the onsite review. Comments will be appended to the Report while mistakes of fact will be corrected and reflected in the final version to meet the deliverable.

V.B.5 - Deliverable 3.6.4.5 Formal Briefing Presentations

FusionSTO proposes twelve formal briefings over the six-year contract span. The first will be the presentation of the Detailed IV&V Plan and Checklists. The remaining eleven will be at the conclusion of the Initial IV&V Review Report and then ten scheduled IV&V Period Review Reports. A revised Detailed IV&V Project Plan will be delivered in person as part of a Periodic IV&V Report Formal Briefing Presentation and will be in effect until the next year, pending any significant project risks and/or change orders impacting the overall Replacement Project. This process of updating the Detailed IV&V Project Plan will be annually through the project life cycle and occur within five calendar days of delivering the final version of the Periodic IV&V Review Report.

V.B.6 - Deliverable 3.6.4.6 Deliverable Observation Reports (DOR)

FusionSTO anticipates that there will be at least two key milestones or gates in the System Development Life Cycle involving 'GO' vs. 'NO GO' decisions. Our experience as Project Managers for large scale, multi-year state government software projects impacting hundreds of end users will provide invaluable insights. We emphasize the importance of defining detailed requirements during the Plan and Design phases and then the importance of critical documentation during the Build and Test phases requiring detailed test plans and user acceptance. Successful completion of these early deliverables adds to the high probability of successful Deployment and Maintenance phases.

Our experience as the IV&V vendor for State government projects has highlighted the importance of the Security Management Plan, as well as the need for project oversight of multiple vendor contracts and plans with interdependent deliverables. Deliverable Observation Reports in these two areas may contribute to the success of the Replacement Project.

V.B.7 - Deliverable 3.6.4.7 Document Archive

FusionSTO will submit a complete CD-ROM of all IV&V documents prepared and submitted by us during the course of each IV&V Review period as directed by the RFP.

VI – Company Background and References

4.1.1- Vendors shall provide a company profile in the table format below:

Question	Response
Company name:	***FusionSTO***
Ownership (sole proprietor, partnership, etc.):	***LLC***
State of incorporation:	***New Mexico***
Date of incorporation:	***May 30, 2014***
# of years in business:	***3.33 years***
List of top officers:	***Patricia Barton -President/ CEO*** ***Mary James - COO***
Location of company headquarters:	***Santa Fe, New Mexico***
Location(s) of the office that shall provide the services described in this RFP:	***Santa Fe, New Mexico***
Number of employees locally with the expertise to support the requirements identified in this RFP:	***None***
Number of employees nationally with the expertise to support the requirements in this RFP:	***Two***
Location(s) from which employees shall be assigned for this project:	***New Mexico***

FusionSTO will register with the Nevada Secretary of State Office as a foreign corporation before contract execution and be appropriately licensed pursuant to NRS76. The license shall be obtained in the legal entity name which is the same as the vendor 'doing business as' – FusionSTO. FusionSTO shall provide, if awarded a contract, the insurance requirements as specified in Attachment D, Insurance Schedule for RFP 3475.

4.1.5 - Has the vendor ever been engaged under contract by any State Nevada agency?

Yes		No	***X****

**** FusionSTO has never entered into contract directly with any State Nevada agency, however, for three years we were the sub-contractor to a software vendor who has been doing business with Nevada Department of Health and Human Services -Aging and Disability Services Division for over ten years.***

Question	Response
Name of State agency:	***Aging and Disability Services Division***
State agency contact name:	***Mark Bedrosian***
Dates when services were performed:	***July 2014 through June 2017***
Type of duties performed:	***Project Management***
Total dollar value of the contract:	

4.1.6 - Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	***X***

4.1.7- Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP shall also be disclosed.

Does any of the above apply to your company?

Yes		No	***X***

4.1.9 - Company background/history and why vendor is qualified to provide the services described in this RFP.

FusionSTO is a 100% women-owned and operated small business based in New Mexico. The business is registered and operates as a Limited Liability Corporation (LLC). The highly skilled and professional partners of FusionSTO have more than 29 years of professional experience in Information Technology (IT) Project Management in both the private and public sector. Competencies have been demonstrated in the areas of Project Management; IT Service Management; IT Verification and Validation Services; and IT Training.

FusionSTO recognizes the many Federal, State and Local changes impacting strategy; technology and operations; reporting requirements; internal and external data gathering; long term data management; the need for more advanced system security requirements; and training needs for clients. Meeting these new mandates in addition to existing laws and mandates will require skilled and highly competent project management services. Providing high quality project management services is what FusionSTO does. Our clients continue to rely on FusionSTO to assist with meeting their goals and expectations in crafting successful project plans that when implemented, stay in scope and within the budgetary and timeline objectives.

FusionSTO brings our clients a broad array of knowledge, skills and experiences that provide customers confidence in our technical skills, our un-paralleled approach to customer service, consensus building and an enthusiasm for team collaborations.

FusionSTO has focused its efforts in helping our clients' meet their IT Project Management needs whether the client's project is small in scope (less than one year) or for larger projects (in excess of one year). Fusion has also excelled at helping our clients with meeting both project time lines and project budgetary constraints while delivering to stated requirements. Our broad range of services are unique in that we are able to fulfill both start to finish diverse project management services as well as training to suit our clientele's needs in the areas of IT project management.

Public sector clients

The partners of FusionSTO have been employed by New Mexico State Government and also have led large statewide implementations in seven states in addition to New Mexico, and county-level implementations in both New Mexico and California. Implementation Projects have spanned from a six-month engagement to as large as a three-year statewide rollout. Training services range from a three-day ITIL Foundations class to a five-day ITIL Managing Across the Lifecycle (MALC) class. Class sizes vary and may have a range of 25

students for an ITIL Foundations class to eight for a MALC class. In 2015, FusionSTO was awarded a State Price Agreement by the New Mexico General Services Department in three categories: Project Management, Independent Verification and Validation (IV&V) and IT Training.

Recent public sector clients and engagements include:

- ***New Mexico State Treasurer's Office – IV&V Vendor, November 2016 -current. The Integrated Treasury Solution project is to align business and accounting practices across multiple agencies and systems. The project is expected to complete in December 2017.***

- ***New Mexico Public Employee Retirement Association – IV&V Vendor, November 2016 – current. The Retirement Information Online (RIO) project involves multiple vendors, contracts, process improvements and vendor interdependencies to improve data integrity, enhance business processes and implement a customer relationship management (CRM) system. The project is expected to complete by July 2018.***

- ***New Mexico Department of Cultural Affairs – IV&V Vendor, May 2016 – November 2016. The Cultural Atlas of New Mexico project is a location-based, mobile-optimized hybrid web app highlighting the state's cultural resources.***

- ***Nevada Department of Human Services, Aging and Disability Services (ADS) Division - IT Project Management, August 2014 – June 2017. FusionSTO was the sub-contractor to Harmony Information Systems and performed the day-to-day project management. The ADS Division automated the Intake, Enrollment, Service Coordination and Interface with the MMIS for billing. Project Management services include: requirements definition, configuration management, validation, training and data conversion.***

- ***New Mexico Educational Retirement Board – Interim CIO, July 2014 through December 2014. Project Management services included implementation and closeout phases for a retirement system upgrade. Additional services included development of security policies; security awareness training to all employees; ITIL Foundations class; and oversight for operational maintenance and support.***

- ***Colfax County, New Mexico – IT consultant, March 2015 – July 2016. FusionSTO provided the expertise, communications, and skills to assist with the operational support and maintenance of information technology.***

- ***Madera County, CA – Department of Social Services, IT Project Manager – 2014/2015. Madera County requested the implementation of an off- the-shelf solution for the intake, service coordination and state reporting for Adult Protective Services reporting.***

- ***State of Hawaii – Executive Office on Aging, IT Project Manager – 2011 – 2013. The project entailed three vendors to collaborate on a statewide project to enhance services to the aging population through the implementation of a web-based solution that provides access to a standardized core set of assessment questions, expanding state staff capacity and elevating the knowledge of state staff.***

Additional IT Project Management work between 2008 and 2012 includes: Sonoma and Los Angeles County Offices in CA and State Offices in New Jersey; North Dakota; West Virginia; Vermont; and Georgia.

Private sector clients

The partners of FusionSTO have worked closely with mid-to-senior level executives of three major companies in various capacities.

- ***Advanced Network Management – 2015 to present. Contracted to provide project management services directly related to infrastructure projects, collaboration projects and networking.***

- ***Harmony Information Systems – 2003 to 2017. Partners of FusionSTO have been customers of, employees of and a contractor of Harmony Information System (now Mediware Information Systems). Harmony creates Commercial Off- the- Shelf software to help state and local agencies manage home and community-based services. FusionSTO is contracted by Harmony to perform above-mentioned work for the State of Nevada.***

- ***GetWellNetwork – 2013 – 2014. Partners of FusionSTO have been associated with senior level executives of GetWellNetwork for many years. Most recently, while employed by GetWellNetwork, our staff led an IT implementation for Kaiser Permanente Hospitals in the Bay Area of California. The project entailed a larger server network installation, patient in-room hardware installation and software that provided patients with an optimal patient experience.***

Project Management experience that preceded the focus on IT Projects, includes global project management experience for consumer products – from concept, market research, development, regulatory compliance, manufacturing, distributions and ultimately to the final sales distribution channel.

Experience with Child Support Enforcement

FusionSTO acknowledges a lack of experience in the area of Child Support Enforcement (CSE). Independent Verification & Validation does not require subject matter area specific knowledge or expertise for a vendor to lead a successful IV& V project. Our in-depth experience in project management coupled with our recent experience with IV&V will provide the Replacement Project with a balanced approach. Without specific CSE experience we will not make assumptions nor hesitate to ask any question of the PMO, QA or Implementation vendors.

4.1.10 - Provide a brief description of the length of time vendor has been providing services described in this RFP to the public and/or private sector

Collectively, the two partners of FusionSTO have a combined total of 29 years of IT Professional Services with over ten years of Project Manager Professional certification. The two partners of FusionSTO have worked together on three IV&V contracts, and will have two years of Independent Verification and Validation contracted experience at the time the Replacement Project IV&V contract begins in May 2018.

Additionally, the partners have been employed in New Mexico state government and have directly implemented web based case management applications.

4.2 Subcontractor Information

The two owners of FusionSTO intend to directly provide the services identified in this RFP. Third parties will be engaged only in the area of support or incidental services.

Yes		No	***X***

4.3 - Business References

Three references have been requested:

Mark Bedrosian, IT Project Manager – State of Nevada Department of Health and Human Services, Aging and Disability Services Division
(775) 687-0577, MarkBedrosian@adsd.nv.gov

Greg Portillos, Chief Information Officer - State of New Mexico Public Employees Retirement Association
(505)476-9324, greg.portillos@state.nm.us

Sam Collins, Deputy State Treasurer - State of New Mexico State Treasurer's Office
(505) 955-1123, sam.collins@state.nm.us

4.4 - Vendor Staff Skills and Experience

4.4.1 Project Manager Qualifications

Mary James PMP, co-owner of FusionSTO possesses all qualifications listed in section 4.4.1 of RFP 3475 and will service as the IV&V Project Manager.

4.4.2 IV&V Qualifications

Qualification	***Mary James PMP***	***Patricia Barton PMP***
4.4.2.1	***Yes***	***Yes***
4.4.2.2	***Yes***	***Yes***
4.2.2.3	***Yes***	***Yes***
4.2.2.4	***Yes – NV Elder Protective Services***	***Yes – NV Elder Protective Services***
4.4.2.5	***Yes***	***Yes***
4.4.2.6	***Yes***	***Yes***
4.4.2.7	***Yes for UAT, No for Automated Tools***	***Yes for UAT, No for Automated Tools***
4.4.2.8	***Yes***	***Yes***
4.4.2.9	***No***	***Yes***
4.4.2.10	***No***	***No***
4.4.2.11	***No***	***No***
4.4.2.12	***Yes***	***Yes***
4.4.2.13	***Yes***	***Yes***
4.4.2.14	***Yes***	***Yes***

VII – Proposed Staff Resumes

FusionSTO owner resumes attached on following eight pages.

PROPOSED STAFF RESUME FOR RFP 3475

Company Name Submitting Proposal:	***FusionSTO***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Mary G. James***	**Key Personnel: (Yes/No)**	***Yes***
Classification; i.e., Project Manager, Implementation Lead, etc.	***Project Manager***		
# of Years in Classification:	***25***	**# of Years with Firm:**	***3.25***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Ms. James is a PMI-certified Project Management Professional with nine years of experience managing IT software implementations for Statewide case management systems including Nevada, New Mexico, New Jersey and Hawaii. Mary's experience has been primarily in serving the aging, disabled and vulnerable adult populations by implementing software to support Aging and Disability Resource Centers and Adult Protective Services Case Management. Most recently, Ms. James completed a series of projects for the State of Nevada's Aging and Disability Services Division over three years including: case management and financial management software implementation for the Developmental Services Unit, case management and financial management for Elder Protective Services; and statewide Serious Occurrence Reporting for Medicaid recipients.

Drawing heavily from her 25 years of experience with formal project management, Mary has been involved with several Independent Verification and Validation contracts for state government. Recent contracts are with the State of New Mexico and include: IV&V for *Cultural Atlas of New Mexico,* a project to implement a location-based, mobile-optimized hybrid web app that highlights the state's cultural resources, IV&V for the *Public Employees Retirement Association RIO Enhancement Project*, a multi-pronged, integrated approach to enhancing and updating the current PERA system and IV&V for *State Treasurer's Office Treasury Module enhancement project*, a project to implement the functionality needed to streamline the processing related to cash management and investment management while improving accuracy, timeliness and data integrity.

Skilled at meeting facilitation, projects are managed with a structured and analytical approach while maintaining creativity and agility. Mary brings expertise in the area of business analysis and defining functional requirements in order to align project outcomes with strategic objectives resulting in added value to the organization.

Mary has considerable experience also in the private sector, project managing hardware and software installations with large regional hospitals in California and global project management for consumer products companies.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the project/position and software/hardware used during the project engagement.

RELEVANT PROFESSIONAL EXPERIENCE – IV&V Vendor

10/2016 – present

Vendor: FusionSTO

Client: New Mexico Public Employees Retirement Association

Client Contact: Greg Portillos, Chief Information Officer
33 Plaza La Prensa | Santa Fe NM 87507, (505)476-9324, greg.portillos@state.nm.us

Role in Project: IV&V Vendor

Project Details: RIO Enhancement Project – Provide Independent Verification and Validation services from 11/2016 through 6/2018. Conduct team member interviews, evaluate project documentation, participate in monthly steering committee meetings and issue bi-monthly reports according to the terms of the contract, while conforming to the New Mexico Department of Information Technology requirements for IV&V.

Project Duration: 21 months

Microsoft Project, SharePoint

RELEVANT PROFESSIONAL EXPERIENCE – IV&V Vendor

10/2016 – present

Vendor: FusionSTO

Client: New Mexico State Treasurer's Office

Client Contact: Sam Collins, Deputy State Treasurer
2055 S. Pacheco St., Suites 100 and 200 | Santa Fe, NM 87505
(505) 955-1123, sam.collins@state.nm.us

Role in Project: IV&V Vendor

Project Details: RIO Enhancement Project – Provide Independent Verification and Validation services from 11/2016 through 12/2017. Conduct team member interviews, evaluate project documentation, participate in monthly steering committee meetings and issue monthly reports according to the terms of the contract, while conforming to the New Mexico Department of Information Technology requirements for IV&V.

Duration of Project: 15 months

Microsoft Project

RELEVANT PROFESSIONAL EXPERIENCE – Project Management

7/2014 – 6/2017

Vendor: Mediware Information Systems

Client: Nevada Department of Health and Human Services, Aging and Disability Services Division

Client Contact: Mark Bedrosian, IT Project Manager
3416 Goni Road, Bldg. D #132 | Carson City, NV 89706
775-687-0577, MarkBedrosian@adsd.nv.gov

Role in Project: Software Vendor Project Manager

Project Details: Section 10202 of the Affordable Care Act established the "State Balancing Incentive Payments Program", referred to as the Balancing Incentive Program, to implement structural changes with the goal of stimulating greater access to non-institutionally based long term services and support. Eight projects were managed with staggered launch dates including Elder Protective Services, an Online Consumer Application, Serious Occurrence Reporting for all Medicaid recipients and a full case and financial management system for the Developmental Services Unit. Project Management activities essential to success included: data conversion planning, weekly team meetings with summaries, frequent project schedule updates, as well as maintaining plans and engaging stakeholders with project risk, communication, training, user acceptance testing, change requests and organizational change management. Participated in all business analysis sessions and approval of the formal Business Analysis documents. The Steering Committee was an integral part of the project's critical decision-making process, allowing for course corrections to occur in order to achieve acceptable go-live dates and an overall project completion date.

Duration of Project: Three years

Microsoft Project, Visio, PowerPoint, WebEx, Gotomeeting, SharePoint, Harmony© for Intellectual/Developmental Disabilities, Salesforce, SharePoint

RELEVANT PROFESSIONAL EXPERIENCE – Project Management

7/2013 – 6/2014

Vendor: GetWellNetwork, Inc.

Client: Kaiser Permanente Hospital – Oakland, CA

Client Contact: Ray Otsuka, Project Manager
Ray.K.Otsuka@nsmtp.kp.org

Role in Project: Vendor Project Manager

Project Details: Managed the implementation of interactive patient engagement software and supporting hardware into three new-construction Kaiser Permanente Bay Area hospitals. Regular communication with C-Suite executives and nursing staff regarding improving the patient experience with a focus on outcomes metrics. Technical communications with network engineers, server installations, cable/satellite providers and other software vendor integrations were essential for a seamless patient experience.

Duration of project: 12 months

Microsoft Project, Visio, PowerPoint, WebEx, SharePoint

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

University of Notre Dame
South Bend, Indiana
Bachelors of Business Administration – Accounting (1978)

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CERTIFICATIONS

Information required should include: type of certification and date completed/received.

Project Management Professional (PMI certified since 2007)
Mastering Business Process Analysis – Villanova University (November 2016)

HARDWARE/SOFTWARE SUMMARY (BE SPECIFIC)

Information required should include: environments, hardware, software, tools and databases.

Microsoft Project, SharePoint, Visio, PowerPoint, WebEx, Gotomeeting, Salesforce, Harmony© for Intellectual/Developmental Disabilities

REFERENCES

A minimum of three (3) references are required, including name, phone number, fax number and email address.

Mark Bedrosian, IT Project Manager – State of Nevada Department of Health and Human Services, Aging and Disability Services Division
(775) 687-0577, MarkBedrosian@adsd.nv.gov

Greg Portillos, Chief Information Officer - State of New Mexico Public Employees Retirement Association
(505)476-9324, greg.portillos@state.nm.us

Sam Collins, Deputy State Treasurer - State of New Mexico State Treasurer's Office
(505) 955-1123, sam.collins@state.nm.us

PROPOSED STAFF RESUME FOR RFP 3475

Company Name Submitting Proposal:	***FusionSTO***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Patricia Barton***	**Key Personnel: (Yes/No)**	***Yes***
Classification; i.e., Project Manager, Implementation Lead, etc.	***Project Manager***		
# of Years in Classification:	***29***	**# of Years with Firm:**	***3.25***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Ms. Barton is a certified Project Management Professional with fifteen years of experience managing IT projects and software implementations for Statewide case management systems including Nevada and New Mexico. Patricia's experience has been primarily in serving the aging, disabled and vulnerable adult populations by implementing software to support Aging and Long-Term Services and Adult Protective Services Case Management. Most recently, Patricia completed a series of projects for the State of Nevada's Aging and Disability Services Division over two years including: case management software implementations for the Developmental Services Unit, case management for Elder Protective Services, and statewide Serious Occurrence Reporting for Medicaid recipients.

Drawing heavily from her 29 years of experience with formal project management, Patricia has been involved with several Independent Verification and Validation contracts for state government. Recent contracts are with the State of New Mexico and include: IV&V for *Cultural Atlas of New Mexico,* a project to implement a location-based, mobile-optimized hybrid web app that highlights the state's cultural resources, IV&V for the *Public Employees Retirement Association RIO Enhancement Project*, a multi-pronged, integrated approach to enhancing and updating the current PERA system and IV&V for *State Treasurer's Office Treasury Module enhancement project*, a project to implement the functionality needed to streamline the processing related to cash management and investment management while improving accuracy, timeliness and data integrity.

Patricia has over twenty years of experience in state government, including eight years as Chief Information Officer (CIO) for New Mexico Aging and Long-Term Services Department. As CIO, Ms. Barton managed all aspects of information technology to ensure efficiency and effectiveness as well as State and federal compliance. Projects managed by Patricia included consolidation of 26 statewide offices onto a single services network; development of a web-based case management system for Adult Protective Services; implementation of a case management system for the Aging and Disability Resource Center; implementation of a call manager system to handle call volume of over 200 calls per day for the Aging and Disability Resource Center; and migration of outdated network to industry standards. Ms. Barton led the Department's cost efficiency project to reduce communication costs – achieved 25% cost reduction.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the project/position and software/hardware used during the project engagement.

RELEVANT PROFESSIONAL EXPERIENCE – IV&V Vendor

10/2016 – present

Vendor: FusionSTO

Client: New Mexico Public Employees Retirement Association

Client Contact: Greg Portillos, Chief Information Officer
33 Plaza La Prensa | Santa Fe NM 87507,
(505)476-9324, greg.portillos@state.nm.us

Role in Project: IV&V Vendor

Project Details: RIO Enhancement Project – Provide Independent Verification and Validation services from 11/2016 through 6/2018. Conduct team member interviews, evaluate project documentation, participate in monthly steering committee meetings and issue bi-monthly reports according to the terms of the contract, while conforming to the New Mexico Department of Information Technology requirements for IV&V.

Project Duration: 21 months

Microsoft Project, SharePoint

RELEVANT PROFESSIONAL EXPERIENCE – IV&V Vendor

10/2016 – present

Vendor: FusionSTO

Client: New Mexico State Treasurer's Office

Client Contact: Sam Collins, Deputy State Treasurer
2055 S. Pacheco St., Suites 100 and 200 | Santa Fe, NM 87505
(505) 955-1123, sam.collins@state.nm.us

Role in Project: IV&V Vendor

Project Details: RIO Enhancement Project – Provide Independent Verification and Validation services from 11/2016 through 12/2017. Conduct team member interviews, evaluate project documentation, participate in monthly steering committee meetings and issue monthly reports according to the terms of the contract, while conforming to the New Mexico Department of Information Technology requirements for IV&V.

Duration of Project: 15 months

Microsoft Project

RELEVANT PROFESSIONAL EXPERIENCE – Project Management

7/2014 – 6/2017

Vendor: Mediware Information Systems

Client: Nevada Department of Health and Human Services, Aging and Disability Services Division

Client Contact: Mark Bedrosian, IT Project Manager
3416 Goni Road, Bldg. D #132 | Carson City, NV 89706
775-687-0577, MarkBedrosian@adsd.nv.gov

Role in Project: Software Vendor Project Manager

Project Details: Section 10202 of the Affordable Care Act established the "State Balancing Incentive Payments Program", referred to as the Balancing Incentive Program, to implement structural changes with the goal of stimulating greater access to non-institutionally based long term services and support. Eight projects were managed with staggered launch dates including Elder Protective Services, an Online Consumer Application, Serious Occurrence Reporting for all Medicaid recipients and a full case and financial management system for the Developmental Services Unit. Project Management activities essential to success included: data conversion planning, weekly team meetings with summaries, frequent project schedule updates, as well as maintaining plans and engaging stakeholders with project risk, communication, training, user acceptance testing, change requests and organizational change management. Participated in all business analysis sessions and approval of the formal Business Analysis documents. The Steering Committee was an integral part of the project's critical decision-making process, allowing for course corrections to occur in order to achieve acceptable go-live dates and an overall project completion date.

Duration of Project: Three years

Microsoft Project, Visio, PowerPoint, WebEx, Gotomeeting, SharePoint, Harmony© for Intellectual/Developmental Disabilities, Salesforce, SharePoint

RELEVANT PROFESSIONAL EXPERIENCE – Project Management

12/2005 – 6/2013

Position: Chief Information Officer

Client: NM Aging and Long-Term Services Department

Client Contact: Michael Spanier
505-919-9942; Bubbamike19@gmail.com

Details: Managed all aspects of Information Technology within the Department's main office and 26 field offices; Consolidated 26 Statewide Adult Protective Service offices onto a single network; Managed and implemented a web-based case management system for Adult Protective Services; Implemented a case management system for the Aging and Disability Resource Center; Project manager for creation of Department website; Project Manager for New Mexico Resource Directory; and led cost efficiency project to reduce communication costs throughout the Department achieving a 25% cost reduction.

Microsoft Project, Visio, PowerPoint, WebEx, SharePoint

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Colorado Technical University
Colorado Springs, Colorado
Master of Science Management, Information Systems Security

College of Santa Fe
Santa Fe, New Mexico
Master of Business Administration, Finance

College of Santa Fe
Santa Fe, New Mexico
Bachelor of Business Administration, MIS

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CERTIFICATIONS

Information required should include: type of certification and date completed/received.

Project Management Professional (PMI since 2014)
ITIL Expert (since 2014)
COBIT (2013)

HARDWARE/SOFTWARE SUMMARY (BE SPECIFIC)

Information required should include: environments, hardware, software, tools and databases.

Microsoft Project, SharePoint, Visio, PowerPoint, WebEx, Gotomeeting, Salesforce, Harmony© for Intellectual/Developmental Disabilities.

REFERENCES

A minimum of three (3) references are required, including name, phone number, fax number and email address.

Mark Bedrosian, IT Project Manager – State of Nevada Department of Health and Human Services, Aging and Disability Services Division
(775) 687-0577, MarkBedrosian@adsd.nv.gov

Greg Portillos, Chief Information Officer - State of New Mexico Public Employees Retirement Association
(505)476-9324, greg.portillos@state.nm.us

Sam Collins, Deputy State Treasurer - State of New Mexico State Treasurer's Office
(505) 955-1123, sam.collins@state.nm.us

VIII – Preliminary Project Plan

ID	Task Mode	Task Name	Start	Finish	Notes
1		**NV CSE Replacement Project - IV&V Preliminary Plan**	**Mon 10/2/17**	**Tue 4/30/24**	**RFP reference**
2		PMO Vendor (CSG) Contract Start	Mon 10/2/17	Mon 10/2/17	
3		QA Vendor Contract Start	Thu 2/1/18	Thu 2/1/18	
4		Implementation Vendor Contract Start	Tue 5/1/18	Tue 5/1/18	
5		**IV&V Project Contract Start**	**Tue 5/1/18**	**Tue 5/1/18**	
6		**IV&V Project Kick Off Meeting**	**Tue 5/8/18**	**Tue 5/8/18**	3.4: Within 2 wks of K-O
7		**IV&V Project Planning**	**Wed 5/2/18**	**Wed 6/20/18**	
8		Create Detailed IV&V Project Plan	Wed 5/2/18	Tue 5/22/18	
9		Create Initial Set of IV&V Checklists	Wed 5/2/18	Tue 5/22/18	
10		Submit Draft Detailed IV&V Project Plan	Wed 5/23/18	Wed 5/23/18	
11		Federal OCSE and NV IV&V Contract Officer review	Thu 5/24/18	Wed 6/13/18	3.5: states 15 days
12		Update the Plan and Checklists from feedback	Thu 6/14/18	Wed 6/20/18	3.3.3.1: states 5 days
13		Presentation of Final Detailed IV&V Plan and Initial Checklists	Wed 6/20/18	Wed 6/20/18	3.1.5: delivery and presentation
14		**Deliverables 3.5.2.1 and 3.5.2.4 (partial) met**	**Wed 6/20/18**	**Wed 6/20/18**	
15		**IV&V Project Activities**	**Fri 6/1/18**	**Tue 4/30/24**	
16		**Initial IV&V Review**	**Fri 6/1/18**	**Thu 9/6/18**	
17		Conduct Initial Onsite Review	Thu 6/21/18	Fri 6/29/18	3.6.2.1: start within 60d of contract and restricted to a 10d calendar period
18		**Deliverable 3.6.4.1 met**	**Fri 6/29/18**	**Fri 6/29/18**	
19		Prepare the Initial IV&V Review Report	Mon 7/2/18	Wed 8/8/18	3.6.2.2:delivery 60d from onsite
20		Submit the Draft Initial IV&V Review Report	Wed 8/8/18	Wed 8/8/18	
21		Federal OCSE and NV IV&V Contract Officer review	Thu 8/9/18	Wed 8/29/18	3.3.1.5: states 20 calendar days
22		Update the Initial IV&V Review Report	Thu 8/30/18	Wed 9/5/18	3.3.3.1: states 5 days
23		Presentation of the Final Initial IV&V Report	Thu 9/6/18	Thu 9/6/18	
24		**Deliverable 3.6.4.2 met**	**Thu 9/6/18**	**Thu 9/6/18**	
25		**Initial IV&V Review Period Administration**	**Fri 6/1/18**	**Fri 8/31/18**	
26		Attend scheduled meetings as requested	Fri 6/1/18	Thu 8/23/18	
27		Submit Written Monthly Project Status Report- June	Fri 6/29/18	Fri 6/29/18	
28		Submit Written Monthly Project Status Report- July	Tue 7/31/18	Tue 7/31/18	
29		Submit Written Monthly Project Status Report- Aug	Fri 8/31/18	Fri 8/31/18	
30		**Deliverables 3.5.2.2 and 3.5.2.3 partially met**	**Fri 8/31/18**	**Fri 8/31/18**	

ID	Task Mode	Task Name	Start	Finish	Notes
31		**Periodic IV&V Review - January 2019**	**Wed 1/2/19**	**Fri 3/29/19**	
32		Conduct Periodic Onsite Review	Tue 1/8/19	Thu 1/17/19	
33		**Deliverable 3.6.4.3 met (partial)**	**Thu 1/17/19**	**Thu 1/17/19**	
34		Prepare the Periodic IV&V Review Report	Fri 1/18/19	Tue 2/26/19	
35		Submit the Draft Periodic IV&V Review Report	Tue 2/26/19	Tue 2/26/19	
36		Federal OCSE and NV IV&V Contract Officer review	Wed 2/27/19	Tue 3/19/19	
37		Update the Periodic IV&V Review Report	Wed 3/20/19	Tue 3/26/19	
38		Presentation of the Final Periodic IV&V Report	Wed 3/27/19	Wed 3/27/19	
39		**Deliverable 3.6.4.4 met (partial)**	**Wed 3/27/19**	**Wed 3/27/19**	
40		**Periodic IV&V Review Period Administration**	**Wed 1/2/19**	**Fri 3/29/19**	
41		Attend scheduled meetings as requested	Wed 1/2/19	Tue 3/26/19	
42		Submit Written Monthly Project Status Report- January	Thu 1/31/19	Thu 1/31/19	
43		Submit Written Monthly Project Status Report- February	Thu 2/28/19	Thu 2/28/19	
44		Submit Written Monthly Project Status Report- March	Fri 3/29/19	Fri 3/29/19	
45		**Deliverables 3.5.2.2 and 3.5.2.3 partially met**	**Fri 3/29/19**	**Fri 3/29/19**	
46		**Annual IV&V Plan and Checklist Revisions**	**Mon 2/18/19**	**Wed 3/27/19**	
47		Update the IV&V Detailed Project Plan	Mon 2/18/19	Tue 2/26/19	
48		Update the IV&V Checklists	Mon 2/18/19	Tue 2/26/19	
49		Submit Updated IV&V Detailed Plan and Checklists	Tue 2/26/19	Tue 2/26/19	
50		Federal OCSE and NV IV&V Contract Officer review	Wed 2/27/19	Tue 3/19/19	
51		Finalize Updated IV&V Detailed Plan and Checklists	Wed 3/20/19	Tue 3/26/19	
52		Presentation of Updated IV&V Detailed Plan and Checklists	Wed 3/27/19	Wed 3/27/19	
53		**Periodic IV&V Review - July 2019**	**Mon 7/1/19**	**Mon 9/30/19**	
54		Conduct Periodic Onsite Review	Tue 7/9/19	Thu 7/18/19	
55		**Deliverable 3.6.4.3 met (partial)**	**Thu 7/18/19**	**Thu 7/18/19**	
56		Prepare the Periodic IV&V Review Report	Fri 7/19/19	Tue 8/27/19	
57		Submit the Draft Periodic IV&V Review Report	Tue 8/27/19	Tue 8/27/19	
58		Federal OCSE and NV IV&V Contract Officer review	Wed 8/28/19	Tue 9/17/19	
59		Update the Periodic IV&V Review Report	Wed 9/18/19	Tue 9/24/19	
60		Presentation of the Final Periodic IV&V Report	Wed 9/25/19	Wed 9/25/19	
61		**Deliverable 3.6.4.4 met (partial)**	**Wed 9/25/19**	**Wed 9/25/19**	
62		**Periodic IV&V Review Period Administration**	**Mon 7/1/19**	**Mon 9/30/19**	
63		Attend scheduled meetings as requested	Mon 7/1/19	Fri 9/20/19	
64		Submit Written Monthly Project Status Report- July	Wed 7/31/19	Wed 7/31/19	
65		Submit Written Monthly Project Status Report- August	Fri 8/30/19	Fri 8/30/19	
66		Submit Written Monthly Project Status Report- Sept	Mon 9/30/19	Mon 9/30/19	
67		**Periodic IV&V Review - January 2020**	**Thu 1/2/20**	**Mon 3/30/20**	Repeat 2019 detail lines 31-45
68		**Annual IV&V Plan and Checklist Revisions**	**Mon 2/17/20**	**Wed 3/25/20**	Repeat 2019 detail lines 46-52
69		**Periodic IV&V Review - July 2020**	**Wed 7/1/20**	**Wed 9/30/20**	Repeat 2019 detail lines 53-66
70		**Periodic IV&V Review - January 2021**	**Mon 1/4/21**	**Wed 3/31/21**	Repeat 2019 detail lines 31-45
71		**Annual IV&V Plan and Checklist Revisions**	**Mon 2/15/21**	**Wed 3/24/21**	Repeat 2019 detail lines 46-52
72		**Periodic IV&V Review - July 2021**	**Thu 7/1/21**	**Thu 9/30/21**	Repeat 2019 detail lines 53-66
73		**Periodic IV&V Review - January 2022**	**Mon 1/3/22**	**Wed 3/30/22**	Repeat 2019 detail lines 31-45
74		**Annual IV&V Plan and Checklist Revisions**	**Mon 2/14/22**	**Wed 3/23/22**	Repeat 2019 detail lines 46-52
75		**Periodic IV&V Review - July 2022**	**Fri 7/1/22**	**Fri 9/30/22**	Repeat 2019 detail lines 53-66
76		**Periodic IV&V Review - January 2023**	**Tue 1/3/23**	**Thu 3/30/23**	Repeat 2019 detail lines 31-45
77		**Annual IV&V Plan and Checklist Revisions**	**Mon 2/13/23**	**Wed 3/22/23**	Repeat 2019 detail lines 46-52
78		**Periodic IV&V Review - July 2023**	**Wed 7/5/23**	**Fri 9/29/23**	Repeat 2019 detail lines 53-66
79		**Periodic IV&V Review - January 2024**	**Tue 1/2/24**	**Fri 3/29/24**	Repeat 2019 detail lines 31-45
80		**Project Close-Out**	**Mon 4/1/24**	**Tue 4/30/24**	

End of Part IA - Technical Proposal