

**PROJECT ASPIRE
DEPARTMENT OF FINANCIAL SERVICES
STATE OF FLORIDA**

**REQUEST FOR QUOTE
CONSULTING SERVICES**

***Project Aspire
Independent Evaluation Services***

1. OBJECTIVE

The Department of Financial Services (DFS, or the Department) is seeking a qualified Independent Evaluator under State Contract No. 973-561-06-1 IT Consulting Services or State Contract No. 973-501-06-ACS IT Advisory Services to perform an evaluation and assessment of the Project with a focus on steps needed to successfully complete the project as well as long term issues of maintainability/upgradeability.

Following a review of responses from qualified bidders, the Department intends to negotiate a Statement of Work (SOW) and issue a Purchase Order under State Term Contract for the performance of such services.

2. SCOPE OF SERVICES

2.1 Work Structure

The Department envisions four (4) categories for assessment:

2.1.1 Next Steps

Assess and recommend the best method/option to complete the project (e.g., use a recovery firm, use in-house state and contractor staff, etc.), indicating time frames, staffing needs, and benefits of each method.

2.1.2 Functional Requirements

- Examine and assess the completeness of the functional requirements by reviewing the Requirements Traceability Matrix (RTM) to determine how well the design specifications map to the functional requirements and to identify any gaps. Verify if there are any limitations in the PeopleSoft software product that would prevent it from meeting the State's needs as captured in the requirements.
- Determine what impact the modifications may have on future system upgrades.

2.1.3 Cost

- Provide the estimated costs associated with the recommended approach to complete the project.
- Assess and estimate the cost of the impacts associated with the modifications as they relate to future system upgrades.

2.1.4 Risk

- Perform a risk assessment on the State's operational ability to cross fiscal years and the impact on the State and agencies of functioning in two accounting systems. Make recommendations based on the identified risks concerning agencies' migrations to the new system.
- Evaluate and perform a risk assessment of the plan that will be used to test the system.
- Perform an analysis of data conversion processes with particular focus on reconciliation from FLAIR to Aspire to include data to be completely and correctly converted, cross fiscal year conversions, etc.

2.2 Deliverables

The evaluation is to begin on or about February 23, 2007 and will continue for approximately 90 days with a detailed and written interim report due on April 6, 2007.

3. QUALIFICATIONS AND STAFFING

The successful bidder for this evaluation will be making recommendations as to the steps needed to successfully complete the project and will therefore not be allowed to perform any of those services for the project in the future other than additional "Independent Evaluator" services that may be needed.

All bidders are required to have performed at least two other engagements as either an Independent Evaluator or the Prime Implementer of a project that is a statewide, public entity, using PeopleSoft v8.4 or higher and having over 4,000 users. Bidders are required to submit two (2) references that can establish those qualifications.

4. FORMAT AND CONTENT OF RESPONSE

Responses to this Request for Quote will be evaluated for content. Award will be made to the bidder whose response best comports with the minimum requirements established herein and contemplates the best interest of the State of Florida. At a minimum, responses should include the following:

4.1 Introduction

Provide background information concerning the bidder's overall capabilities, and the specific Corporate Qualifications for this engagement. Cite examples of other similar engagements, or other ERP engagements similar to Project Aspire.

4.2 Engagement Strategy and Approach

Provide information about the intended strategy and approach for providing the specific services outlined herein, including a high-level work plan. This section of the RFQ will form the basis for the Statement of Work (SOW), to be negotiated with the selected bidder.

4.3 Qualifications of Relevant Personnel

Provide details regarding the qualifications and background of the proposed Evaluation Engagement Coordinator. Bidders must confirm that the proposed Evaluation Engagement Coordinator will be available for the duration of the contract. Provide a sense of the bidder's "bench strength." Describe the

pool of ERP SMEs from which the Department could draw. Provide a representative sample of resumes of individuals who could be used in the role of ERP SME to execute evaluation inquiries.

4.4 Disclosure of Independence and Relationship

This is certification that no relationship exists between the bidder and any other person or organization that would constitute a conflict of interest which would prevent the bidder from effectively performing the services required by the ensuing contract.

4.5 Public Records

This is a statement of understanding that all records or data produced by the bidder in response to this RFQ are subject to applicable public records law(s). The bidder will not be permitted to respond to any third party requests for such records without the prior and express written consent of the Department.

4.6 Cost Proposal

The Cost Proposal will include the following:

- The Evaluation Engagement Coordinator must be specified by name. The proposed level of effort for the Evaluation Engagement Coordinator must be specifically stated in hours and the proposed Job Title classification must be specifically stated.
- A rate structure of various proposed Evaluation SME Job Title classifications for all activities must be included. This rate structure must parallel the Job Title structure provided in State Term Contract No. 973-561-06-1 or 973-501-06-ACS, and the quoted rates must be equal to or less than the rates provided in State Term Contract No. 973-561-06-1 or 973-501-06-ACS.

Reimbursement for travel expenses is specifically NOT authorized.

5.0 EVALUATION SCHEDULE, BUDGET, and PAYMENTS

5.1 Evaluation

Responses to this RFQ will be evaluated based on criteria contained herein and award made to the response that is most advantageous to the State in meeting the objectives of this assessment.

5.2 Schedule

The Independent Evaluator engagement will begin on or about February 23, 2007 through and lasting 90 days to on or about May 17, 2007.

5.3 Budget

The anticipated budget for the Independent Evaluation services is \$500,000.

5.4 Payments

There will be a maximum of two payments for this engagement, one at the submission of the interim report due by April 6, 2007 constituting no more than half the total engagement price, with the balance due upon submission of the final report to be presented on or about May 17, 2007.

6.0 TIMETABLE

- Request for Quote (RFQ) emailed on or before Monday, February 12, 2007.
- Response to Request for Quote (RFQ) due to Department on or before Monday, February 19, 2007.
- Evaluator selected on or before Friday, February 23, 2007.
- Evaluator begins work no later than Monday, February 26, 2007.

7. QUESTIONS REGARDING REQUEST FOR QUOTE

Questions regarding services being requested by this RFQ may be directed to:

Donna Vollertsen, Deputy Project Director
Project Aspire
Forrest Building, New Koger Center
2728 Centerview Drive
Tallahassee, Florida 32301
Telephone Number: 850-413-3887
Email address: Donna.Vollertsen@fldfs.com

8. MISCELLANEOUS

8.1 Contract Manager

The Contract Manager is the main point of contact for all issues related to the Services performed under the SOW resulting from this RFQ. The Contract Manager for this Project is:

Donna Vollertsen, Deputy Project Director
Project Aspire
Forrest Building, New Koger Center
2728 Centerview Drive
Tallahassee, Florida 32301
Telephone Number: 850-413-3887
Email address: Donna.Vollertsen@fldfs.com

8.2 Contract Special Conditions

The provisions of State Term Contract No. 973-561-06-1 and 973-501-06-ACS, except as modified by this RFQ, are incorporated and attached or available online at the DMS link below:

http://dms.myflorida.com/business_operations/state_purchasing/vendor_information/state_contracts_agreements_and_price_lists/state_term_contracts/information_technology_consulting_services and
http://dms.myflorida.com/business_operations/state_purchasing/vendor_information/state_contracts_agreements_and_price_lists/alternate_contract_source/it_research_and_advisory_services