



State of Oklahoma
Department of Central Services
Central Purchasing

Amendment of Solicitation

Date of Issuance: February 11, 2013

Solicitation No. 0900000073

Requisition No. 0900001057

Amendment No. 1

Hour and date specified for receipt of offers is changed: ☐ No ☒ Yes, to: 2/20/2013 3.00 PM CST/CDT

Pursuant to OAC 580:15-4-5(c)(5), this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent.

Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery:

Department of Central Services, Central Purchasing
P.O. Box 528803
Oklahoma City, OK 73152-8803
or

Kathy Hallum

Contracting Officer

(405) - 521 - 3835

Phone Number

Personal or Common Carrier Delivery:

Department of Central Services, Central Purchasing
Will Rogers Building
2401 N. Lincoln Blvd., Suite 116
Oklahoma City, OK 73105

kathy.hallum@omes.ok.gov

E-Mail Address

Description of Amendment:

a. This is to incorporate the following:

PLEASE SEE BELOW ALL QUESTIONS RECEIVED AND THEIR ANSWERS REGARDING THIS RFP

Q1. How is the Help Desk organized currently? Can we receive an organizational chart, number of employees, positions and brief job descriptions? Are there currently open positions or planned hires?

- A1. 1. The Office of Management and Enterprise Services does not have a "Help Desk" by ITIL standards, but rather a service desk. By definition a "Help Desk" only answers IT questions, the OMES team answers everything from IT to Financials to Human Resources to Public safety.
2. The Service Desk employs a tri-tier structure.
- a. Tier 1: Least experienced often temporary workers to answer the inbound telephone calls, create and classify cases in the ticketing system and dispose of simple requests such as password resets that take 3 minutes or less.
 - b. Tier 2: Generalists. Expected to know a good deal of knowledge about a wide range of

b. All other terms and conditions remain unchanged.

Supplier Company Name (**PRINT**)

Date

Authorized Representative Name (**PRINT**)

Title

Authorized Representative Signature

Description of Amendment - continuing

subjects. This tier is able to resolve the majority of inbound issues they face but are not subject matter experts in any particular area. They typically work a request for 15-30 minutes before exhausting their training and/or scripts. This staff must function in the tier 1 role when required.

- c. Tier 3: Subject matter experts. These individuals are the subject matter experts and must know their area from top to bottom. These staff must be able to function as a tier 2 and tier 1 as required by volume.

3. The ISD has about 900 employees. Service Desk positions include:

- a. Manger
- b. Supervisor
- c. Tier I (6) (4 permanent, 2 temporary)
- d. Tier II (10)
- e. Tier III (2)

4. Yes

- a. Tier II – (2) - we've been asked to hold off hiring these spots and try and fill them with college interns in the summer.

Q2. How many customers, departments, and agencies does the Help Desk support? If operating as a shared services across multiple departments and agencies, are service level agreements in place? What are the service level metrics contained in the agreements and are they currently being met?

- A2. 1. The OMES Service Desk responds to all 160+ state agencies, every state employee, each institution of higher learning in the state, and the entire populace of her citizens. We also respond to other state governments, vendors, federal agencies, and the media as events occur. The inexact nature of this nebulous population makes it impossible to give a precise number.
2. Yes. If the intent of the question is to distinguish between those with whom we have service level agreements and those with whom we have service agreements – the primary difference being a guarantee of service for price with quality guarantee... we have a predominance of SLAs not SAs. We also have Operating Level Agreements between IT divisions to ensure smooth transactions.

“SLAs are published, predetermined set of agreed upon resolution deadlines between the Helpdesk (Service Desk) and our customers. These SLAs are based on a variety of factors – including security threats, criticality of software involved, number of users affected, and customer deadlines. Grouped by ‘priorities,’ the SLAs govern the actions and escalation policies for all Provider Groups.” (Operations Manual, Office of State Finance, Technical Support Desk, Version 1.6, page 21, 2008)

3. The overall SLA success rate is roughly 93% within SLA. The metrics we meet depend entirely on our customer base. For IT, our metric rates are published on <http://www.ok.gov/cio/>. [CIO Page > Operations Metrics > Support Service Level Dashboard]. There are others that are not published externally – for example the SLA for our internal Communications Department.

Q3. Does the help desk currently send surveys to customers? Is there a report outlining responses?

- A3. Yes. Different surveys go to different audiences depending on level of involvement, executive level oversight, and overall responsibility of the customer. There are reports for each.

Q4. How many calls does the Help Desk receive daily?

- A4. In 2012, the Service Desk took 275,000 telephone calls. This does not account for emails or self-service. We generated more than 130,000 individual cases in 2012.

Q5. Are policy and procedures currently in place? If so, when were they last updated?

- A5. Yes. December, 2012. These are updated as we consolidate new agencies, as we bring on new services, or as our instructions adjust to fit the agency's mission.

Description of Amendment - continuing

Q6. Does the help desk currently follow COBIT standards?

A6. We are an ITIL shop, not a COBIT shop. That being said, we do have many of the same if not most of the same functions as listed in COBIT.

Q7. Is there a current help desk management system in place? If so, what system.

A7. The state of Oklahoma's official system for case management is Oracle's PeopleSoft CRM. We are running version 9.1 Help Desk.

Q8. Are monthly reports available that we could have as an example to assess activity and performance?

A8. Yes and will be made available should vendor make it to clarification phase.

Q9. Are prioritization and escalation procedures in place and could we have a copy?

A9. Yes and will be made available should vendor make it to clarification phase.

Q10. Does the help desk have strategic goals for 2013? If so, what are they?

A10. The strategic goals are aligned with the consolidation team in that we have defined metric to meet number of agency desks consolidated into our Service Desk. In 2013, we are to consolidate 31 agencies' IT into ours. The sheer scope of consolidation forces the entirety of our strategic goals to be focused on delivering secure and quality service to our customer agencies with an almost zero project scope until the end of consolidation.

Q11. Are help desk agents trained? If so what type of training?

A11. Yes. "Training is a continual fact of life for Help Desk (Service Desk) members. We attend training provided by the various Provider groups as well as providing training for CRM to those requesting it. Occasionally we attend training offered by outside entities (such as PeopleSoft)." (*Operations Manual, Office of State Finance, Technical Support Desk, Version 1.6, page 29, 2008*) The methods or mechanisms are:

- a. Computer Based Training
- b. On the Job Training
- c. Classroom

Q12. Are knowledge management tools being used – such as a database customers can access for self help?

A12. Yes - as part of Oracle's PeopleSoft CRM

Q13. How many tickets are currently open?

A13. At any given moment in the system – all ticket types combined – it could be as high as 300 or as low as 100.

Q14. What is the average response time?

A14. In 2012, Telephone calls were answered at a 34 second average. The ITIL definition of response time varies by case type.

Q15. Does this solicitation only cover help desk process or does it include an assessment of IT field services?

A15. This is not limited to the Service Desk. This solicitation covers customer service processes and procedures and satisfaction with services received from the ISD Division of the Office of Management and Enterprise Services.

"... evaluating the customer service level expectations, policies and performance as well as resource needs and distribution to include the State's IT support services, helpdesk (Service Desk) and other customer facing accountabilities." --RFP Solicitation #0900000073

Description of Amendment - continuing

Q16. What is the 2013 budget for the help desk?

A16. For FY '13, the total budget for the Information Services Division listed below includes funding for the consolidation of upcoming agencies and for serving agencies already consolidated. Service Desk funding is included in the Total Budget figure.

Total Budget ISD Division: \$132,075,706

Service Desk: \$657,727

Q17. Are there currently critical issues or problems management would like resolved?

A17. OMES-ISD is currently in the process of consolidating the state's IT services, assets and personnel for the purpose of efficiency and cost-effectiveness. The obvious consequences of the project mean increasing responsibilities for managing and maintaining the agencies' needs including support and services of their newly acquired clients.

A growing challenge is managing and meeting customer expectations while achieving the intent of the law to streamline processes, optimize the use of resources and realize cost savings. A balance must be achieved and maintained to ensure core services of government are successfully executed.

Q18. How do customer interact with the help desk? Email, phone, chat sessions, etc.

A18. Yes. In addition to in person, by fax (rare), by letter (rare).

Q19. Are there any current state projects such as new system implementation or expansion that would affect help desk resources in 2013?

A19. Consolidation of state IT services and resources will increase the workload of the service desk and support services in the coming years. In addition, other projects to implement new software and/or systems as well as enhancement projects will also affect them.

Q20. Have there been any external or internal audits of the help desk in the past 3 years? If so, would reports be available to us.

A20. Yes but are not available at this time. They will be made available should vendor make it to the clarification phase if they are available by then.

Q21. In D.2.6.1. critical team components for evaluation (and past performance information) are listed as the Firm, Project Manager, and Project Lead. On Attachment B, it looks like just the Firm and Project Manager. Which is correct?

A21. Section D.2.6.1 is correct. Please add name of Project Lead to Attachment B.

Q22. Is converting the PDF RFP to Word and inserting responses (like for Attachments E and F) acceptable? As of 2/5, there is no Word version of Attachments E and F available on the website.

A22. All attachments have been posted to our website in Word Format with this Amendment.

Q23. Do you need to be registered with the State to submit and have a Proposal considered? (I understand that registration is required for a contract to be signed).

A23. No, you may submit a proposal without being registered with the State. Registration is required for contract award.

Q24. Is there any particular form or format required for the "draft project Milestones plan" (Attachment C)?

A24. No, just complete Attachment C.

Q25. Our company is a fairly new company but my partner and I have over 40 years of experience in auditing. How is the best way to meet the requirements for Past Performance? Can we send surveys to management personnel that we have performed audits for in the past to meet your requirements?

A25. Yes, you may get references on individuals for work done while working for another company. For your current

Description of Amendment - continuing

company you should gather any references that you can.

Q26. How many State agencies are supported by the Office of Management and Enterprise Services?

A26. Answered in # 2 above

Q27. Where is the Office of Management and Enterprise Services located?

A27. OMES has several locations (see below). OMES-ISD serves agencies in all 77 counties.

- A. State Capitol (2300 N. Lincoln Blvd, Oklahoma City 73105) houses the Main Office, Division of Budget Policy and Communications; Division of Central Accounting and Reporting (DCAR); and Division of Performance and Efficiency.
 - a. Santa Fe Building (3812 N. Santa Fe, Suite 400, Oklahoma City 73126) houses DCAR's Agency Business Services (ABS).
- B. ISD Building (3115 N. Lincoln Blvd., Oklahoma City 73105) houses the Information Services Division
- C. Will Rogers Office Building (2401 N. Lincoln Blvd., Suite 206, Oklahoma City 73105) houses the Division of Capital Asset Management; and Central Purchasing Division.
 - a. DCAM Department of Central Printing is located at 2120 N.E. 36th, Oklahoma City 73111
- D. Jim Thorpe Building (2101 N. Lincoln Blvd., Oklahoma City 73105) houses the Human Capital Management Division.
- E. Landmark Towers (3545 NW 58th St., Suite 110, Oklahoma City 73112) houses the Employee Group Insurance Division and the Legal Division.

Q28. Where are the State agencies located?

A28. See # 27 directly above

Q29. Does the State use multiple held desk systems (Service Management Tools)?

A29. The state's official system is PeopleSoft CRM. There are other systems within the state that will be consolidated and retired from service when that agency is officially consolidated into the state's IT system.

Q30. Are Help Desk Services outsourced to a provider or vendor?

A30. No

Q31. Can the State provide an organization chart in advance?

A31. Please see the attached organization chart

Q32. Can the State provide the number of users supported by the Office of Management and Enterprise Services?

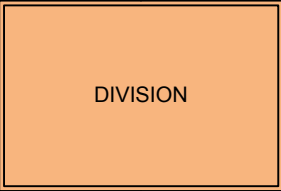
A32. See #2 above

OFFICE of MANAGEMENT and ENTERPRISE SERVICES

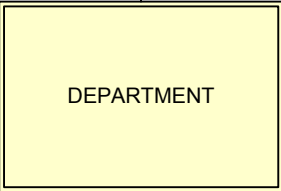
ORGANIZATIONAL LEVELS



- Agency Director



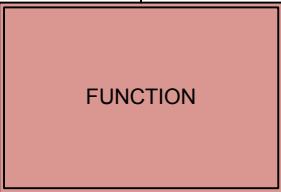
- Division Directors
- Division Administrators
- Chief Information Officer



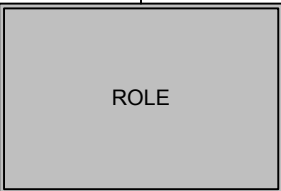
- Department Directors
- Deputy Division Directors
- Business Segment Directors



- Program Managers
- Group Managers



- Supervisors
- Team Leads
- Function Coordinators



- Professional Position
- Technical Positions
- Administration/Staff Support



- Vacant Position



- Possible Discrepancy

Office of Management and Enterprise Services

