

**WR K2073 Feasibility Study for Next Generation Contact Center**

**Proposal Evaluation Approach**

1. The Solicitatio Coordinator will review all proposals for Responsiveness.  
Reference WR K2073 Section 7, Phase 1.

2. Responsive proposals will evaluated and scored. Evaluators will review each responsive proposal individually, followed by a facilitated group session to apply a consensus score for each scored area.  
Reference WR K2073 Section 7, Phase 2.

3. Top scoring proposals will advance to the interview and presentation phase. After each presentation the evaluation team will discuss and come to a consensus score for each element.  
Reference WR K2073 Section 7, Phase 3.

4. Top scoring proposals will advance to the reference checks phase.  
Reference WR K2073 Section 7, Phase 4.

DOR may choose to also consider:  
Cost  
Sched C - Contract Issues List  
Sched E - regarding Workers' Rights  
Sched F - regarding Wage Theft  
Certifications related to supporting a diverse vendor pool

If a consensus score cannot be reached for any scored element, each evaluator will provide a score and the scores will be averaged to provide a consensus score.

<b>WR K2073 Feasibility Study for Next Generation Contact Center Bidder Information - All Responses</b>		
Vendor Name	<b>Gartner Inc</b>	<b>Integrated Solutions Group (ISG)</b>
Contact Info	Chris Ragan, Sr Managing Partner 916-420-1860 chris.ragan@gartner.com	Tom Boatright, Principal 360-915-3965 tom.boatright@isg-nw.com
UBI or commitment to obtain?	already have - verified	already have - verified
Payee number or commitment to obtain?	already have - verified	Tax ID given on form; verified SWV number is assigned on OFM vendor lookup
OMWBE Certified?	no	no
Small/Mini/Micro business?	no	yes, small
DVA certified?	no	no
Using Subcontractor?	no	yes, GTX Consulting, Brenda Hays
Sub - OMWBE Certified?	n/a	no
Sub - Small/Mini/Micro business?	n/a	yes, micro
Sub - DVA certified?	n/a	No
Telephony/Contact Center solution relationship?	No	No
Debarment?	No	No
Former State Employee(s)?	No	yes
Proposal Cost:	\$377,100.00	\$139,592.70
Available to start:	December 1, 2022	December 14, 2022
Proposed team:	Heide Cassidy and Chris Ragan, Managing Partners Eric Cameron, Engagement Manager TBD, Project Consultant Paul Petersen, Project Consultant Doreen Sturgis, Project Consultant Manish Jyotishi, Project Consultant Chris Krantz, Project Consultant un-named, Research Analyst Kristina Mattull, Gartner Account Partner	Emily Davis, Engagement Lead/Proj. Manager Brenda Hays, Technical Advisor/ IT BA Robert Kennedy/Contact Center BA Tom Boatright, Project Advisor
Administrative review notes		10/11 per DOR request, received admin corrections: Veteran status of subcontractor on pg 29 or proposal; and Schedule B on pg 43 using the DOR template - no change to info.

<b>WR K2073 Feasibility Study for Next Generation Contact Center</b>		
<b>Evaluation Summary</b>		
	<b>Gartner Inc</b>	<b>Integrated Solutions Group (ISG)</b>
Phase 1 - Responsive	yes	yes
Phase 2 - Written Proposal Evaluation	46	55
Phase 3 - Interview and Presentation	n/a	28
Phase 4 - Reference Checks	n/a	Pass

WR K2073 Feasibility Study for Next Generation Contact Center		
<i>This page identifies if all required proposal elements were included, and if vendor is considered Responsive overall.</i>		
<b>Vendor Name</b>	Gartner Consulting	Integrated Solutions Group (ISG)
<b>Rec'd by 10/7/2022 5:00 pm?</b>	Yes	Yes
<b>Date/time rec'd</b>	10/7/2022 2:52 pm	10/7/2022 12:12 pm
<b>WR K2073 [Vendor Name] on subject line?</b>	yes	yes
<b>On master contract 08215, Cat 1?</b>	yes	yes
<b>Response in Word or PDF? Written in English?</b>	yes	yes I (Heidi) OK'd the PDF's to be sent in zipped file to avoid potential problems when sending multiple response emails in order for all the examples to get to us (size prohibited sending all in one email). This was done early on Friday so multiple emails could be send if the zipped file didn't work.
<b>Formatted as required?</b>	yes	yes sections do not have numbering per WR Section 5. Accepted as Administrative Oversight.
<b>Response Contents</b>		
<b>Signed Exec Summary</b> 1 page intro remarks experience date available contract signatory	yes	yes
<b>Written Proposal</b>	Yes	yes
<b>Deliverable Examples</b> Proj Plan & Sched Needs Assmt. Market Research Imp Plan Feas Study & Pres	yes	yes
<b>Consultant Resumes</b> Summary/yrs exp 5 pages	yes	yes
<b>Sched A - Vendor Info</b>	yes	yes
<b>Sched B- Del Cost/Timeline</b>	yes, rate is below that on master contract	yes, rate is below that on master contract
<b>Sched C - Contract Issues</b>	yes (see Sched C for issues submitted)	yes (no contract issues) not on DOR form accepted as Administrative Oversight.
<b>Sched D - Cons Ref's</b>	yes	yes formatting and page breaks resulted in some references spanning 2 partial pages. Met intent of 1 page per reference. Accepted as Administrative Oversight.
<b>Sched E - EO 18-03</b>	yes (no mandatory arbitration clause)	yes (no mandatory arbitration clause)
<b>Sched F - Wage Theft</b>	yes (no wage violations)	yes (no wage violations)
<b>Sched G - Conf Info</b>	yes, some information/pages are marked as confidential.	yes, no information marked as confidential.
<b>Responsive?</b>	yes	yes



K2073 - Feasibility Study for NextGen Contact Center  
Phase 2 - Written Proposal Evaluation

Possible Points	Gartner Inc.		Integrated Solutions Group		
	raw score (0 - 10)	times factor of 2 final score	raw score (0 - 10)	times factor of 2 final score	
<b>Executive Summary and Written Proposal</b> <b>Executive Summary:</b> - Intro remarks - Brief summary of Vendor & Consultant experience and history providing similar Feas Study services. - Date available to start work. - 1 page limit <b>Written Proposal:</b> - Detailed approach and methodology - Approach and methodology to align with tasks in SOW and deliverables - include # of Consultants on project: names, R's and R's for each - internal controls for project - approach to issue and risk management - Alternative tasks identified as "Alternative Approach, with second Sched B. - 5 page limit	20	5	10	8	16
Evaluation Notes				addressed experience includes 13 Feas Study over 6 years, 3 being this year; detailed approach/methodology; clear Rs and Rs for proposed consultants; experience in alignment with DOR needs; approach built towards securing financing (DP); call out of gathering contact center requirements; acknowledged that DOR has multiple contact centers; discussed process mapping and fit/gap analysis.	
<b>Vendor Qualifications and Experience</b> Schedule A - Areas of expertise of Vendor company. - Experience providing services similar to this WR and length of time. - Staffing model and Replacement of consultants. - Length of time in business. - Additional information and ability to meet business needs described in WR. - Reference section - Description of Scope of Work section demonstrates experience in alignment with this WR and SOW.	10	5	5	8	8
Evaluation Notes				multiple, similar studies for other state agencies under OClO requirements.	
<i>note: reference checks will occur later in process</i> <b>Consultant Qualifications (Resumes)</b> Years of experience summary for items in WR section 4B. Resumes detail the consultant's experience and KSAs related to this WR and SOW. Resumes are direct and succinct and focus on qualifications for the role the consultant will fill for this SOW. WR Section 4B, Consultant Knowledge, Experience and Qualifications, "Highly Desired": - Experience conducting Feas Studies, in IT environments, comparable to this WR and SOW. - Experience working with WA state agencies on OClO level initiatives, preferably Feas Studies. - Experience scoping systems integration projects - Experience articulating major objectives on an IT investment and define the work necessary to achieve those objectives with a high degree of confidence. - Ability to provide detailed and concise contextual document and artifact generation. - Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems. - Experience writing large, complex studies for state programs. - Experience evaluating risk and internal controls. - Strong analytical capabilities - Excellent written, oral, and interpersonal communication skills. - Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors. - Experience working under tight deadlines. - Ability to prioritize and manage multiple priorities. - Experience with and ability to facilitate diverse teams of business and IT professionals "Additional Desired Experience": - Telephony and Contact Center industry and technology knowledge - Experience working with Wa State agencies - Experience working with governmental organizations	30	8	24	5	15
Evaluation Notes				highly qualified; good relevant experience; contact center SME spoke to aligning IT infrastructure capabilities with business needs; others with contact center experience; discussed leveraging AI; strength of proposed consultants stood out.	
5 page limit	n/a				
<b>Deliverable Examples</b> 1. Project management plan and schedule 2. Business background and needs assessment 3. Market research results documentation 4. High-level implementation plan and approach 5. Completed feasibility study and presentation	10	2	2	8	8
Evaluation Notes				no project management plan, only a schedule; assessment example was weak; implementation plan and approach lacked information on approach; no completed feasibility study and presentation example: high-level examples.	
Deliverables described in WR section 3G. Examples may be copies from previous clients, or templates clearly describing the content typically included.				provided above and beyond relevant examples that tied back to approach and what is to be completed with this feasibility study; included workload buildup; good focus on requirements gathering.	
<b>Deliverable Cost and Timeline (cost element is not considered for scoring)</b> Timeline to Complete Alternate Deliverables/Alternate Schedule B, if included	10	5	5	8	8
Evaluation Notes				provided details for each section of the timeline; draft implementation schedule specific to DOR work with resource names and time frames.	
<b>Max Possible Points</b>	80		46		55

advanced to interview/presentation



K2073 - Feasibility Study for NextGen Contact Center Phase 3 - Interview/Presentation			
<b>Presentation Date - Confirmed:</b>			
November 1st, 9 - 10:30		<b>Integrated Solutions Group</b>	<b>Notes for consensus scoring discussion</b>
<b>Bidder Interview/Presentation Evaluation</b>	Pts Possible	Pts given	
Approach, methodology, and deliverables	10	10	thoughtful approach; already identified similar customers; discussed how experience aligns with DOR needs; proven approach to completing FS's; strong knowledge of what is needed to complete the FS.
Alignment to project purpose	10	10	demonstrated reading of DOR WR; alignment with what DOR is looking for; vendor picked up on OCM need that wasn't specifically addressed in WR; discussion of KPI's and alignment to contact center modernization and advanced knowledge of this area; discussed if there was no need for some sort of improvement, DOR would not be considering a replacement solution. Presentation clearly demonstrated vendor has done homework on what DOR needs.
Proposed Critical Success Factors	10	8	those identified by vendor will elevate the FS information; demonstrated applicable experience; vendor is bringing experience from working with other state agencies, particularly in the procurement phase that follows a FS.
Additional information	Not scored, but considered.		
total	30	28	<b>advance to reference checks</b>

**Agenda:**

1 hour for presentation, then 30 mins for Q & A

Introduction of vendor and proposed consultants.  
Proposed approach and methodology for SOW and deliverables.  
Demonstrate vendor's understanding of purpose of SOW.

Critical Success Factors

Additional Information

Scoring Guide		
Description	Score	Rating
Proposal does not align with the DOR project and/or ability to create quality deliverables for this WR.	0	No Value
Proposal reflects a lacking in some areas of knowledge, creativity, and/or skill in the type of work required in this WR.	2	Poor
Proposal reflects an average level of knowledge, creativity and/or skill in the type of work required in this WR.	5	Average
Proposal reflects above average knowledge, creativity, and/or skill in the type of work required in this WR.	8	Good
Proposal reflects advanced knowledge, creativity, and/or skill in the type of work required in this WR.	10	Excellent

K2073 - Feasibility Study for NextGen Contact Center Phase 4 - Reference Checks									
Vendor - Integrated Solutions Group		Emily Davis		Brenda Hays		Robert Kennedy		Tom Boatright	
Reference	Pass/Fail	Reference	Pass/Fail	Reference	Pass/Fail	Reference	Pass/Fail	Reference	Pass/Fail
Health Care Authority - Cathie Ott	NA (not contacted because retired now)	WA Arts Commission - Annette Roth (combined with Brenda Hays)	Pass	WA Arts Commission - Annette Roth (combined with Emily Davis)	Pass	Continuant - Gasper Gulotta	Pass	Health Benefit Exchange - Cathie Ott	NA (not contacted because retired now)
Office of Financial Management - Cristie Fredrickson (ref ck for Tom Boatright is this ref ck also)	Pass	WA Arts Commission - Deane Shellman	NA (not contacted)	WA Arts Commission - Deane Shellman	NA (not contacted)	Continuant - Jim paige	Pass	Office of Financial Management - Cristie Fredrickson	Pass
Consolidated Technology Services - Bill Kehoe	NA (not contacted)	Dept. for Services for the Blind - Michael MacKillop	Pass	United Health Group - Julie Moreau	Pass	Continuant - Brian Hall	Pass	Health Benefit Exchange - Vincent Barrailer, replaced by Randi Schaff who worked on same project.	Pass