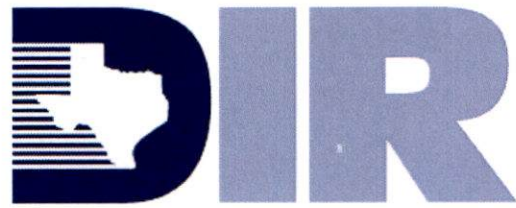


communication needs of end-users with disabilities.		
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Texas Department of Information Resources

**Request for Offer
DIR-TSO-TMP-419**

**Managed Print Services, Printers, Copiers, 3D Printers, Scanning,
Plotting and Facsimile Equipment and Related Services;
Document Imaging Services/Solutions;
Enterprise Content Management Products, Software and Services**

Bid Package 10

**Vendor ICT Accessibility Policy Assessment
(PDAA)**



Vendor ICT Accessibility Policy Assessment

This Information and Communications Technology (ICT) accessibility assessment is for vendor organizations to describe how they are currently implementing accessibility policy and practices within their organizations.

Please complete this form by checking a box for each topic that most closely match the current state of your organization. A completed example is available using the "Example" tab of the worksheet. This assessment is not a substitute for other requested accessibility information such as VPATS.

Package 10, Vendor ICT Accessibility Policy (PDAA) should be directed to Jeff Kline: Phone: 512-463-3248 Email: jeff.kline@dir.texas.gov

Organization Information

Organization name: _____
 Organization address: _____
 Responder contact information: _____
 Date of assessment completion: _____

My organization is a (choose one or more if applicable)

- Manufacturer: My organization develops and sells its own ICT products / services
- Service Provider: My organization sells IT development services
- Integrator: My organization develops customer solutions using a combination of products / services from manufacturers and products / components developed by my organization
- Reseller or Catalog Supplier: Does not develop or have its own products, but offers COTS 3rd party products

For each criteria statement, please enter the number corresponding to your response in the shaded areas of the "Response" column for the status statement in each grouping that is most relevant to your organization today.

Responses

1. Develop, implement, and maintain an ICT accessibility policy.

0 My organization has no plan to have an ICT accessibility policy. (If selected, skip to next section or provide comments at the end of this section)

1a. Having an ICT accessibility policy.

- 1 My organization is developing an ICT accessibility policy.
- 2 My organization is finalizing an ICT accessibility policy.
- 3 My organization has approved an ICT accessibility policy.

1b. Having appropriate plans in place to implement and maintain the policy.

- 1 My organization is developing plans to implement our ICT accessibility policy and ensure that it is maintained.
- 2 My organization has completed planning for initial implementation and maintenance of our accessibility policy.
- 3 My organization has approved plans for accessibility policy implementation and maintenance.

1c. Establishing metrics and tracking progress towards achieving compliance to the policy.

- 1 My organization is identifying metrics that can be used to gauge policy compliance.
- 2 My organization is collecting metrics and has begun designing progress reporting based on them.
- 3 My organization is tracking progress on policy adoption and continues to refine the metrics.

Section 1 Comments (Provide any comments or additional information on this section here.)

2. Establish and maintain an organizational structure that enables and facilitates progress in ICT accessibility.

0 My organization has no plan to develop a governance system to support ICT accessibility. (If selected, skip to next section or provide comments at the end of this section)

2a. Developing an organization wide governance system.

- 1 My organization is investigating opportunities to improve organization wide governance for ICT accessibility.
- 2 My organization is finalizing plans that will result in an organization wide governance system.
- 3 My organization has approved plans for an organization wide governance system.

2b. Designating one or more individuals responsible for implementation.

- 2 My organization has identified key individuals in the implementation process.
- 3 My organization has assigned implementation duties and responsibilities to appropriate individuals.

2c. Implementing reporting/decision mechanism and maintain records.

- 1 My organization is developing tools and procedures for tracking ICT accessibility issues.
- 2 My organization is tracking and keeping records of ICT accessibility reporting and decisions.
- 3 My organization uses reports to make organizational changes to improve ICT accessibility.

Section 2 Comments (Provide any comments or additional information on this section here.)

Frequently Asked Question (FAQ) for Vendors regarding Policy-Driven Adoption for Accessibility (PDAA)

1. What is PDAA?

Policy-driven Adoption for Accessibility (PDAA) is a tool that Vendors can use to demonstrate the extent to which their organization has implemented accessibility best practices within operations. The PDAA concept is based on the following principles: towards the creation of accessible offerings over the long term.

- Enabling products for accessibility requires integrating accessibility criteria into all phases of a product life cycle, and other
- Many state and federal agencies are required by law to procure or develop accessible offerings based on technical standards. Gaps in Vendor internal governance systems and leadership commitment inhibit their ability to meet these standards. continue to improve them over time.

2. Why are buying organizations requesting information on company accessibility policy?

Making an organization's information and communications technology (ICT) offerings accessible to people with disabilities requires commitment in many areas of that organization. PDAA data helps buying organizations understand a Vendor's accessibility policy, A mature accessibility policy implementation signals that the vendor is truly aware of the implications or accessibility requirements and is prepared to resolve any issues in a timely manner with minimal friction. It also makes it more likely that the Vendor understands that accessibility is more than meeting a set of technical guidelines or standards, and that usability will be a factor in how they go about meeting the technical requirements. Accessibility that is planned, designed, and built in from the beginning consistently results in a friendlier product for all users including those with disabilities

3. Why is PDAA information important to the buying organization?

The requested information provides insight into Vendors' ability to develop accessible commercial off the shelf (COTS) and non-COTS offerings, which can increase the procuring organizations' confidence in the accuracy of Vendor's accessibility documentation. Current ICT accessibility reporting formats such as VPATs (Voluntary Product Assessment Templates) only apply to COTS products and services. In many cases, Vendor VPATs lack credibility due to limited knowledge about their offerings' accessibility. Additionally,

4. How will this information be used?

The initial completed form will establish a baseline for where a vendor stands with regard to its ICT accessibility policy. The baseline illustrates the depth and maturity of the Vendor's support for accessibility policy and practices as illustrated via the PDAA Maturity (<http://publishingext.dir.texas.gov/portal/internal/resources/DocumentLibrary/PDAA%20Maturity%20Matrix.pptx>)

The questionnaire may also be included in future solicitations so that progress can be assessed. The Vendor responses from the questionnaire may be considered as an element in Vendor selection; however, this would be determined by the procuring. Additionally, Vendor organizations can use the results as a roadmap for implementing their organization-wide ICT accessibility initiatives, which will help ensure that programs and processes are in place to facilitate the development of future accessible

5. We already submit VPATs as part of solicitation responses. Is that adequate?

No. VPATs (Voluntary Product Assessment Templates) are product-specific. PDAA is a holistic presentation of the organization's approach to accessibility. The expectation is that organizations with mature approaches to PDAA will greatly improve the levels of

6. What is the PDAA Maturity Model?

Based on the Capability Maturity Model (CMM) concept, the PDAA Maturity Model (Link on next line) provides buying organizations and vendors with a simple dashboard or matrix to track and demonstrate Vendors' progress toward full system-wide support of (<http://publishingext.dir.texas.gov/portal/internal/resources/DocumentLibrary/PDAA%20Maturity%20Matrix.pptx>)

7. Where can I obtain more information on Accessibility Policy implementation for my organization?

(<http://dir.texas.gov/View-Resources/Pages/Content.aspx?id=39#Procurement>)

Or contact the Statewide EIR Accessibility Coordinator via Email at:

statewideaccessibilitycoordinator@dir.texas.gov

For government organizations/agencies

8. What is PDAA?

Policy-driven Adoption for Accessibility (PDAA) is a tool that Vendors can use to demonstrate the extent to which their organization has implemented accessibility best practices within operations. The PDAA concept is based on the following principles: towards the creation of accessible offerings over the long term.

- Enabling products for accessibility requires the integration of accessibility criteria in all phases of a product life cycle, and other
- Many state and federal agencies are required by law to procure or develop accessible offerings based on technical standards, but gaps in internal governance and commitment by industry inhibits the adoption and implementation of these standards.
- Agency procurement organizations need assurances that vendors have the ability to produce accessible offerings and continue

9. Does the PDAA replace VPATs?

No. VPATs (Voluntary Product Assessment Templates) are product-specific. PDAA is a holistic presentation of the organization's approach to accessibility. VPATs are still a valuable tool at the product level, and the expectation is that vendors with mature

10. Why a "maturity model" of evaluation?

Successfully enabling an organization for ICT accessibility requires implementation within various areas of an organization. As with any organization-wide initiative, implementation cannot occur all at once. The PDAA Maturity Model is used to gauge progress (<http://publishingext.dir.texas.gov/portal/internal/resources/DocumentLibrary/PDAA%20Maturity%20Matrix.pptx>)

11. Why should we support vendors who have mature PDAA practices?

A mature accessibility policy implementation signals that the vendor is fully aware of the implications of accessibility requirements and is prepared to resolve any issues in a timely manner with minimal friction. It also makes it more likely that the vendor understands that accessibility is more than meeting a set of technical guidelines or standards, and that usability will be a factor in

12. How should we score PDAA information?

In general, the PDAA questionnaire is meant to ensure that the same information is collected from all bidders, and how the agency offerings or Vendors by the procuring organization.

PDAA evaluation is an area that will need some practical experience, and we hope that organizations will share what they learn.

13. Where does the PDAA information fit within the procurement process?

Using consistent information in evaluating bids is a key element of open and competitive public procurements. The information given in a PDAA report can help judge the ability of a Vendor to: complete a VPAT correctly, produce accessible custom ICT offerings (web sites, web applications, software, etc.), resolve accessibility defects when discovered, and otherwise be a partner in helping

14. What happens if the vendor claims the information is confidential or a trade secret?

Vendors often claim this for information required in procurements. Your organization's procurement laws, policies, or practices may

15. What other states are using the PDAA model?

The PDAA model is in its early stages. A coalition of states are working with several national associations to harmonize the criteria for this model, and for obtaining and evaluating PDAA information. The goal is for more states and other government entities to

16. Where can I obtain more information on Accessibility Policy implementation for my organization?

<http://dir.texas.gov/View-Resources/Pages/Content.aspx?id=39#Procurement>

Or contact the Statewide EIR Accessibility Coordinator at:

statewideaccessibilitycoordinator@dir.texas.gov

EXAMPLE



Vendor ICT Accessibility Policy Assessment

This Information and Communications Technology (ICT) accessibility assessment is for vendor organizations to describe how they are currently implementing accessibility policy and practices within their organizations. Please complete this form by checking a box for each topic that most closely match the current state of your organization. A completed example is available using the "Example" tab of the worksheet. This assessment is not a substitute for other requested accessibility information such as VPATS. All questions, inquiries, etc. regarding Bid Package 10, Vendor ICT Accessibility Policy (PDAA) should be directed to Jeff Kline: Phone: 512-463-3248 Email: Jeff.Kline@dir.texas.gov

Organization information

Organization name: Company X
Organization address: 1111 State Blvd. Anytown, TX 78701
Responder contact information: myemailaddress@yahoo.com
Date of assessment completion: 1/1/15

My organization is a (choose one or more if applicable)

- Manufacturer:** My organization develops and sells its own ICT products / services
- Service Provider: My organization sells IT development services
- Integrator: My organization develops customer solutions using a combination of products / services from manufacturers and products / components developed by my organization
- Reseller or Catalogue Supplier: Does not develop or have its own products, but offers COTS 3rd party products

For each criteria statement, please enter the number corresponding to your response in the shaded areas of the "Response" column for the status statement in each grouping that is most relevant to your organization today.

Responses

	1. Develop, implement, and maintain an ICT accessibility policy.
	<input type="checkbox"/> My organization has no plan to have an ICT accessibility policy. (If selected, skip to next section or provide comments at the end of this section)
2	1a. Having an ICT accessibility policy.
	<input type="checkbox"/> My organization is developing an ICT accessibility policy.
	<input type="checkbox"/> My organization is finalizing an ICT accessibility policy.
	<input type="checkbox"/> My organization has approved an ICT accessibility policy.
1	1b. Having appropriate plans in place to implement and maintain the policy.
	<input type="checkbox"/> My organization is developing plans to implement our ICT accessibility policy and ensure that it is maintained.
	<input type="checkbox"/> My organization has completed planning for initial implementation and maintenance of our accessibility policy.
	<input type="checkbox"/> My organization has approved plans for accessibility policy implementation and maintenance.
1	1c. Establishing metrics and tracking progress towards achieving compliance to the policy.
	<input type="checkbox"/> My organization is identifying metrics that can be used to gauge policy compliance.
	<input type="checkbox"/> My organization is collecting metrics and has begun designing progress reporting based on them.
	<input type="checkbox"/> My organization is tracking progress on policy adoption and continues to refine the metrics.
	Section 1 Comments (Provide any comments or additional information on this section here.)
	2. Establish and maintain an organizational structure that enables and facilitates progress in ICT accessibility.
	<input type="checkbox"/> My organization has no plan to develop a governance system to support ICT accessibility. (If selected, skip to next section or provide comments at the end of this section)
1	2a. Developing an organization wide governance system.
	<input type="checkbox"/> My organization is investigating opportunities to improve organization wide governance for ICT accessibility.
	<input type="checkbox"/> My organization is finalizing plans that will result in an organization wide governance system.
	<input type="checkbox"/> My organization has approved plans for an organization wide governance system.
2	2b. Designating one or more individuals responsible for implementation.
	<input type="checkbox"/> My organization has identified key individuals in the implementation process.
	<input type="checkbox"/> My organization has assigned implementation duties and responsibilities to appropriate individuals.
	2c. Implementing reporting/decision mechanism and maintain records.
1	<input type="checkbox"/> My organization is developing tools and procedures for tracking ICT accessibility issues.
	<input type="checkbox"/> My organization is tracking and keeping records of ICT accessibility reporting and decisions.
	<input type="checkbox"/> My organization uses reports to make organizational changes to improve ICT accessibility.
	Section 2 Comments (Provide any comments or additional information on this section here.)
	3. Integrate ICT accessibility criteria into key phases of development, procurement, acquisitions, and other relevant business processes.
	Manufacturers: Address processes that pertain to your development of ICT products.
	Service providers: Address processes that pertain to your development of ICT services.
	Integrators: Address processes that pertain to your ICT integration services and solutions.
	Catalog Vendor/Reseller: Address processes that pertain to your reseller or catalogue offerings.
	<input type="checkbox"/> My organization has no plan to integrate accessibility criteria into key business processes. (If selected, skip to next section or provide comments at the end of this section.)
1	3a. Identifying candidate processes for criteria integration.
	<input type="checkbox"/> My organization has a plan to identify and evaluate its key business processes for accessibility gaps.
	<input type="checkbox"/> My organization has evaluated its key business processes for accessibility gaps and is developing plans to better integrate accessibility criteria into these processes.
	<input type="checkbox"/> My organization has approved plans to integrate accessibility criteria into these processes.
1	3b. Implementing process changes.
	<input type="checkbox"/> My organization has begun modifying its key business processes to integrate accessibility criteria.
	<input type="checkbox"/> My organization has completed accessibility criteria modification for some of its key business processes and has begun using these modified processes.
	<input type="checkbox"/> My organization has completed accessibility criteria modification for most of its key business processes and has begun using these modified processes.
	3c. Integrate fully into all key processes.
	<input type="checkbox"/> My organization has fully integrated accessibility criteria into all of its key business processes and is using these processes to improve the accessibility of its product / service offerings.
	<input type="checkbox"/> My organization has fully integrated accessibility criteria ACROSS its key business processes and is using these integrated processes to improve the accessibility of its product / service offerings.
	Section 3 Comments (Provide any comments or additional information on this section here.)
	4. Provide processes for addressing inaccessible ICT.
	Manufacturers: Address processes that pertain to your development of ICT products in 4a, 4b, 4c, and 4d.
	Service providers: Address processes that pertain to your development of ICT services in 4a, 4b, 4c, and 4d.
	Integrators: Address processes that pertain to your ICT integration services and solutions in 4a, 4b, 4c, and 4d.
	Catalogue Vendor/Reseller: Address processes that pertain to your reseller or catalogue offerings in 4e.
	<input type="checkbox"/> We do not have plans to provide processes for bringing ICT developed and sold by our organization into accessibility compliance. (If selected, skip to next section or provide comments at the end of this section.)
2	4a. Creating plans that include dates for compliance of inaccessible ICT.
	<input type="checkbox"/> We are developing plans to identify and test ICT developed and sold by our organization.
	<input type="checkbox"/> We have begun identifying and testing for accessibility in ICT products / services developed and sold by our organization and are developing plans that include dates for bringing inaccessible ICT into compliance.
	<input type="checkbox"/> We perform accessibility testing on all products / serviced developed and sold by our organization, and have plans in place that include dates for bringing inaccessible ICT into compliance.
2	4b. Providing alternate means of access until the ICT is accessible.
	<input type="checkbox"/> We do not have plans for providing alternate means of access for our organization's ICT offerings.
	<input type="checkbox"/> We are developing plans for providing alternate means of access for our organization's ICT offerings.
	<input type="checkbox"/> We are implementing methods providing alternate means of access for our organization's ICT offerings.
	<input type="checkbox"/> We have fully implemented a repeatable process for providing alternate means for our organization's ICT offerings.
2	4c. Implementing a corrective actions process(s) for handling accessibility technical issues and defects
	<input type="checkbox"/> We are developing a corrective actions process for handling accessibility technical issues and defects
	<input type="checkbox"/> We are implementing a corrective actions process for handling accessibility technical issues and defects
	<input type="checkbox"/> We have fully implemented an integrated corrective actions process for handling accessibility technical issues and defects.
1	4d. Maintaining records of identified inaccessible ICT, corrective action, and tracking.
	<input type="checkbox"/> We plan to develop a record keeping system for tracking the accessibility status of current and future products / services.
	<input type="checkbox"/> We plan to develop a record keeping process for corrective action tracking and handling of accessibility related issues / defects.
	<input type="checkbox"/> We have a record keeping system for tracking the accessibility status of current and future products / services.
	<input type="checkbox"/> We have a record keeping process for corrective action tracking and handling of accessibility related issues / defects.
	<input type="checkbox"/> We have a record keeping system for tracking the accessibility status of current and future products / services and use this system to improve the accessibility of our offerings.
	<input type="checkbox"/> We have a record keeping process for corrective action tracking and handling of accessibility related issues / defects and use this system to improve the accessibility of our offerings.
	4e. Maintaining records of identified inaccessible ICT, corrective action, and tracking. (Catalogue Vendor/Reseller only)



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Request for Offer DIR-TSO-TMP-419

Addendum 1

This Addendum #1 to Request for Offer DIR-TSO-TMP-419

1. Replaces Bid Package 1, Section 4.3.1 RFO schedule extending the RFO response due date and Vendor Reference due date to February 19, 2019 2:00 PM (CT)
2. Replaces Bid Package 1, Section 3.1, Paragraph 43;
3. Replaces first sentence of Bid Package 1, Section 4.7.1;
4. Replace Bid Package 1, Exhibit A Vendor Information, Item 10;
5. Contains questions and answers submitted in writing at the Vendor Pre-Bid Conference and Webinar, and to Carrie Thomas, the Purchasing Point of Contact.
6. Provides a copy of the December 21, 2018 Vendor Pre-Bid Conference Sign-In Sheet as an attachment to this Addendum #1; and
7. Provides a copy of the December 21, 2018 Vendor Pre-Bid Conference presentation slides as an attachment to this Addendum # 1.

1. DIR-TSO-TMP-419 Bid Package 1, Section 4.3.1 RFO Schedule is hereby replaced as follows:

4.3.1 RFO Schedule

It is DIR's intention to comply with the following schedule for this RFO. These dates represent a tentative schedule of events. DIR reserves the right to modify these dates at any time. Prospective Vendors will be notified of modifications to the schedule via the Electronic State Business Daily (ESBD) web site.

Date/Time	Activity
December 12, 2018	Publish RFO on Electronic State Business Daily
December 21, 2018 9:00 A.M. – 11:00 A.M. (CT)	<i>Optional</i> Vendor Conference
January 7, 2019 2:00 P.M. (CT)	Deadline for submitting questions
January 22, 2019 COB (CT)	<i>Estimate</i> for posting answers to questions on the ESBD
February 19, 2019 2:00 PM (CT)	Deadline for DIR to receive Vendor references
February 19, 2019 2:00 PM (CT)	Deadline for submitting responses to DIR
February 19, 2019 – until completed	Evaluation of responses, oral presentations (if requested), negotiation and contract execution



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Addendum 1

2. DIR-TSO-TMP-419 Bid Package 1, Section 3.1 Products, paragraph 43 is hereby replaced with:

Document Imaging Services/Solutions

Document imaging equipment systems can take many forms including microfilm, computer output microfilm (COM) and archive writers, or indexing services. Document Imaging means the conversion of paper files (of any size or description) or microfilm / fiche to digital images. Digital Imaging means the conversion of digital files, but not limited to digital to microfilm/ fiche, and microform to digital conversion. This RFO seeks Document Imaging Services or Solutions that may include but are not limited to:

- Document Conversion
- Preservation and Archive Scanning and Imaging
- Document preparation
- Indexing and formatting
- Digital retention, storage and hosting
- Microfiche and Digitization Imaging
- Image Enhancement
- ICR/OCR/OMR
- Interface with Customer system

3. DIR-TSO-TMP-419 Bid Package 1, Section 4.7.1 first sentence is amended as follows:
VENDOR MUST PROVIDE THE ITEMS LISTED BELOW OR THE RESPONSE MAY BE DISQUALIFIED.
4. DIR-TSO-TMP-419 Bid Package 1, Exhibit A Vendor Information, Item 10 is hereby replaced with:
10. Vendor must send the Vendor Reference Questionnaire to three (3) companies or government agencies either via the BidStamp VIS Portal or directly via email. Instructions are included in **Bid Package 8**. DIR is not responsible for undeliverable e-mails or for non-responsive references. If DIR does not receive a vendor reference, Vendor will receive a score of "0" for that reference. Include all requested information. References must respond to DIR on the form provided by the due date in order to be considered in proposal evaluation. The Vendor Reference Questionnaire form must be submitted directly from the reference to DIR. The Vendor may not submit the reference form to DIR. Should this occur, the reference will be scored with a zero (0).



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Addendum 1

5. **Questions and Official Answers:**

1. **Question:** Are agencies able to procure digital print services through this vehicle?

Answer: This RFO does not include commercial digital print services. Texas state agencies procure digital printing services through the Comptroller's Statewide Procurement Division State Print Shop Web Portal.

2. **Question:** Will digital print and, or print mail going to be accepted under this cooperative contract as miscellaneous?

Answer: Print mail services are not included in this RFO. Refer to the Answer to Question 1 above, and Bid Package 1, Section 3. Scope. Print mail services are offered through DIR's Shared Technology Services (STS). STS is currently in the planning phase of a solicitation for **Data Center Services - Print, Mail, and Digitization** due to post in Summer 2019. Please see DIR's [Current Contracting Initiatives](#) page for more information.

3. **Question:** (Pg 6, Section 3.1) The RFO mentions scanning services, referred to as digital imaging and document imaging, and hardware with respect to Managed Print Services, but is silent on actual print services. We understand in the past, agencies used the CCG contract for printing services. Does the RFO consider the use of the contract for printing and/or digital printing services? Digital printing is defined as any printing not using plates to transfer an image or text.

Answer: Printing Services are not included in Bid Package 1, Section 3. Scope. Please refer to the Answer to Question 1 above.

4. **Question:** (Pg 6 Section 3.1) Does the RFO consider the use of the contract for offset printing services, defined as any printing that would use plates to transfer an image or text?

Answer: Offset Printing Services are not included in Bid Package 1, Section 3. Scope.

5. **Question:** (Pg 6 Section 3.1) Does the RFO consider the use of the contract for agency printing and any associated mail fulfillment services as well?

Answer: Primary Printing Services and Mail Fulfillment Services are not included in Bid Package 1, Section 3. Scope. Please refer to the Answers to Questions 1 and 2 above.



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Addendum 1

6. **Question:** (Pg 6, Section 3.1; Pg 18 Section 3.1.1.1. Under "The Third Tab", Miscellaneous/ Other) If the answer is yes to any of the three previous questions, please indicate the pricing schedule for these services that DIR would prefer?

Answer: The answer is No for questions 3, 4, and 5. Refer to the Answers to Questions 3, 4 and 5 above.

7. **Question:** Will the BidStamp VIS System allow multiple people to have an account from the same vendor?

Answer: Yes, a single Vendor account may have multiple users.

8. **Question:** May multiple people from one company have access to the portal?

Answer: Multiple users may have access to a single Vendor account.

9. **Question:** Can you partially fill out and log in later to continue?

Answer: Yes, BidStamp allows Vendors to leave and return to their response to complete up to the due date and time of the response. DIR suggests selecting SAVE in each line item of the BidStamp pricing form before exiting.

10. **Question:** Are scanner manufacturers and software provided by responder considered 3rd party?

Answer: Third party software is software that is not published by the manufacturer (as in an operating system/manufacturer application).

11. **Question:** Scanner manufacture (i.e. Kodak) and software developers (i.e. Docuware) each considered 3rd party vendors requiring submittal of documents for authorized vendors of these?

Answers: Refer to the Answer to Question 10 above.

12. **Question:** Will a manufacture certificate be required for third party equipment?

Answer: Vendors must provide proof that they are an authorized Reseller for each manufacturer's product proposed in their response. Refer to Bid Package 1, Section 4.5.1, 1).



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Addendum 1

13. Question: General - Do out of state dealers need a letter of authorization to participate on contract?

Answer: Vendors must be authorized to do business in Texas in order to have a contract with DIR.

14. Question: Exhibit B, Question 1, Detailed history, Is there a page limitation?

Answer: No, use additional pages as needed.

15. Question: To make it easier to manage the product list, in other contracts pricing references have been set up with product category discounts. Will this not be the case for this contract? We have to list every single product for each product category that fits the contract?

Answer: Yes, a complete response will list every product/service offered in Bid Package 2 in the appropriate tab (Entire Offering) and if it does not fall within one of the categories listed/formatted then, it should be offered/listed in the Miscellaneous/Optional category.

16. Question: Would you address changes (new ones and removing old ones) as it relates to this contract after contract award?

Answer: DIR understands that products have a lifecycle. If awarded a contract, Vendor will work with their assigned DIR Contract Manager to edit their product offering on a schedule determined by DIR and Vendor. These scheduled changes may include, but are not limited to replacing obsolete products, adding enhanced or new versions, and deleting products. In addition, DIR will consider changes at the annual optional renewal term or per the emerging technology changes described in Bid Package 1, Section 3.3 Emerging Technologies.

17. Question: General Question: Under this contract award is software available as a stand-alone acquisition item to qualified entities or will software solutions only be allowed as an add-on to hardware purchases?

Answer: Yes, as it relates to Bid Package 1, Section 3. Scope.



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Addendum 1

18. Question: DIR-TSO-TMP-419- Bid Package 1- RFO- Please confirm that it is the intent of DIR to allow standalone software components on this RFO.

Answer: Refer to the Answer to Question 17 above.

19. Question: Has the Master Operating Lease and or Master Lease been changed from the current lease under contract?

Answer: DIR has no knowledge of the contract referenced in the question. The Master Operating Lease Agreement and the Master Lease Agreement for this RFO are posted as Bid Package 5 and Bid Package 6, respectively.

20. Question: Will DIR allow or add to lease agreement (MLA / MOLA) "Standard \$1.00 Out Lease" structured program/option? Note: Customer would have option to transfer title of ownership at end of lease for \$1.00.

Answer: **Yes**, refer to Bid Package 6, Master Lease Agreement, Section 13. Purchase and Renewal Options; Location and Surrender of Equipment which discusses a Fair Market Value option.

21. Question: Will DIR allow or add to leasing agreements (MLA / MOLA) "Tax Exempt Municipal Lease" structured program/option? Note: This would require title of ownership to transfer to customer.

Answer: Additional terms to the existing MLA or MOLA may be negotiated between the Vendor and customer as long as the proposed term(s) do not diminish DIR contract or DIR MLA/MOLA terms.

22. Question: How can we validate you have received the references?

Answer: You may contact your references or have them cc: you when they submit to DIR.

23. Question: Who can we talk to for clarification on cancelled contracts?

Answer: Questions should go to Carrie Thomas, as stated in section 4.1 of the RFO.



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24. Question: All questions submitted pertain to: DIR-TSO-TMP-419. Who can we talk to for clarification on cancelled contracts?

Answer: Refer to the Answer to Question 23 above.

25. Question: Are there provisions for small businesses to be a prime on this contract?

Answer: Any qualified Vendor able to provide products and/or services described in this RFO will be evaluated to move to negotiations. Vendors awarded a DIR contract will be considered as master contract holders. There are provisions for Resellers, Order Fulfillers and Subcontractors in Bid Package 1, Section 4.5.1 Authorized Vendors.

26. Question: RFO 3.1 PG 12 DIS, is a narrative required for any of the bullets? If so, where to put it in the proposal?

Answer: The contents of Vendor's proposal must meet the requirements of the RFO, and are at the Vendor's discretion. It is in the Vendor's best interest to answer each question thoroughly.

27. Question: Is this contract specific to TX based vendors? If not, are there preferences TX based vendors have? Explain?

Answer: No, refer to Bid Package 4, Appendix A, Section 3. Definitions, A. No preferences are given to Texas based Vendors.

28. Question: Are Texas-based vendors preferred for this contract?

Answer: Refer to the Answer to Question 27 above.

29. Question: What if a customer wants to purchase ECM service/product but they do not want DCS product or service?

Answer: DIR assumes that the Vendor's question refers to "DIS" and not "DCS". In that regard, each DIR Cooperative contract will have an Appendix C Pricing Index which will provide the Vendor's unique offering of products/services.



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30. Question: Is there an option to upload a single Excel or Word document or does each question need to be entered individually?

Answer: Each question and each document should be submitted singly in the BidStamp Vendor Information System portal (VIS).

31. Question: Would it be acceptable to upload one single Word document with all completed RFO documents embedded within that one document or do all of the RFO documents and any additional documentation need to be separately attached one by one?

Answer: No. Vendors should not embed any documents within the proposal and each document should be uploaded separately into the VIS portal.

32. Question: Could you please provide me with the link to the recorded webinar for the prebid conference from the Friday before Christmas?

Answer: The webinar was not recorded. The Prebid Conference PowerPoint slides are attached to this Addendum 1.

33. Question: General - due to the complexity of the RFP, we request a 2 week extension do the due date.

Answer: DIR has extended the Due Date. Refer to Item 1 of this Addendum 1.

34. Question: DIR-TSO-TMP-419- Entire Bid Package-Would DIR consider offering an extension to this RFO?

Answer: DIR has extended the Due Date. Refer to Item 1 of this Addendum 1.

35. Question: General Question: To provide DIR with a comprehensive response that considers all of your valued feedback, we respectfully request a two (2) week extension of current due date. Will DIR extend due date of February 4, 2019 to February 19, 2019?

Answer: Refer to the Answer to Question 34 above.



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36. Question: DIR-TSO-TMP-419. Would DIR consider extending the period for vendors to pose questions to Thursday Jan 10th, 2019? This will allow respondents to further understand the RFO and accommodate for personnel who have been on vacation during this holiday period.

Answer: DIR has extended the Due Date. Refer to Item 1 of this Addendum 1. Vendors may submit clarification questions to the contact listed in Bid Package 1, Section 4.1.

37. Question: Document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page:22, Section Number: 4.3.1 RFO Schedule January 22, 2019 COB (CT) Estimate for posting answers to questions on the ESBD. Can DIR extend the RFP deadline to insure two weeks from the date of publication of the question responses? Responses could impact the ability of vendors to give DIR the best pricing possible.

Answer: DIR has extended the Due Date. Refer to Item 1 of this Addendum 1.

38. Question: Will the Department of Information Resources (DIR) please allow a second round of questions to clarify any of the answers provided from the first round of vendor questions? It is often the case that answers provided (in general) require additional clarification.

Answer: The Due Date for all questions in the VIS Portal was January 7, 2019. Vendors may submit clarification questions to the contact listed in Bid Package 1, Section 4.1.

39. Question: General - would DIR consider adding another round of questions and answers after this initial round?

Answer: Refer to the Answer to Question 38 above.

40. Question: DIR-TSO-TMP-419- Entire Bid Package- Would the State consider allowing vendors to ask secondary questions to allow for additional clarification when needed?

Answer: Refer to the Answer to Question 38 above.



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41. Question: General: What is the process for price adjustment over the term of the award? For example, a 3rd party software price change (up or down). Can new pricing be submitted as long as the discount rate remains the same?

Answer: MSRP Pricing can be adjusted in accordance with manufacturer's suggested retail pricing. Throughout the life of the contract, the awarded Vendor may offer increased discounts off MSRP, but they may not decrease the discount off MSRP.

42. Question: Is it DIR's intention to post the sign in sheet for the pre-conference that was held on December 17th along with any notes regarding questions and answers? Thank you!

Answer: The Sign in Sheet is attached to this Addendum 1. Refer to #5 of the Summary listed above.

43. Question: What is the estimated number of projects per month? (an average)

Answer: Refer to Bid Package 4, Standard Terms and Conditions, Section 2. No Quantity Guarantees.

44. Question: What is the estimated number of pages for the average project? (an average)

Answer: Each individual Customer project is based on the Customer's requirements.

45. Question: What is the minimum project size? Ex. 20 boxes (50,000 images)

Answer: Refer to the Answer to Question 44 above.

46. Question: Where do you anticipate projects will be coming from? (office/locations)

Answer: Any eligible DIR customer may purchase products and services offered on a DIR Cooperative contract.

47. Question: What is expectation regarding document transport? Will agency/office ship?

Answer: Refer to the Answer to Question 44 above.



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48. **Question:** May we perform hybrid onshore/offshore manual indexing from images where your data remains at a SunGuard data center within the U.S. while offshore workers remotely capture the index information?

Answer: Yes, as long as the data remains within the contiguous United States.

49. **Question:** Document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page:13, Section Number: Document Imaging/Solutions

a. Is this specific to Document Imaging/Solutions only?

Answer: Yes, see the header which appears on page 12, Document Imaging/Solutions.

b. Would DIR accept utilizing Offshore resource specific to back office activities such as Billing, Contract Management and Order Entry?

Answer: Refer to the Answer to Question 47 above.

50. **Question:** Document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page:9, Section Number 3.1 Products. Managed Print Services Examples. Technical Support

Regarding the Analyst services necessary to support Customers connecting their devices to their networks (if applicable) is remote (non-on site) services acceptable?

Answer: Yes, remote services are acceptable. Refer to the Answer to Question 48 above.

51. **Question:** RFO 3.3 page 19 "Vendor may propose such products and related services."

a. What is the process for a vendor to propose to DIR emerging technologies products/services for augmentation to the original solicitation?

Answer: Refer to Bid Package 1, Section 3.3 Emerging Technologies.

b. Would the emerging technologies products/services proposed by that vendor then undergo a bidding process amongst the other contracted vendors (assuming there were multiple contract awards)?



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Answer: Refer to the Answer to Question 51 a. above.

52. Question: RFO 3.5 page 20 “..all Vendors must submit completed VPAT form (Bid Package 9) or links to completed VPATS...”

a. During the Vendor Conference, vendors were instructed to upload the form as a Word document.

If links are used, should they be pasted into the VPAT Word document? Or, if the links should they be listed in the vendor’s proposal, what section of the response should these links be placed under?

Answer: If a Vendor is using links to the manufacturer websites only, Vendors should include a word document titled "VPATs" with the list of links to the specific products that are included in the submitted Pricing Index. If Vendor is a manufacturer submitting the VPATs for the products, Word documents or PDF will be fine. The important thing is that all the VPATs that are submitted are accurate.

b. Page 20 / Section 3.5 - Please confirm that VPAT's are not required for services, only required for physical or electronic products.

Answer: VPAT’s are only required for commercial off-the-shelf IT hardware or software.

53. Question: RFO 4.5.1 page 25 “Vendors who respond to this RFO must be one of the following:”. Are the signed letter(s) of authorization required for vendors who are providing services (not reselling products)?

Answer: Yes, a signed letter from the Manufacturer/Publisher certifying that Vendor is an authorized Service Provider of Manufacturer’s/Publisher’s products.

54. Question: RFO 4.4.1 page 24 “...An original, signed paper copy of the HSP must be uploaded into BidStamp.” and 4.7.1.4 page 27 “HUB Subcontracting Plan Forms”

Answer: Yes, all pages of the HSP must be completed, signed, scanned and uploaded to the VIS Portal.



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55. **Question:** During the Vendor Conference, it sounded like vendors are to fill in an HSP form within BidStamp VIS, then print it out, sign it, and then upload the signature page. Are all the pages of the HSP to be uploaded or just the signature page of the HSP?

Answer: Refer to the Answer to Question 54 above.

56. **Question:** Our proposal was arranged according to “Section 4.7: Response Format and Contents” from the Bid Package 1 RFO document; however, Bid Package 1 RFO Exhibit A doc also had a section of what to include (16A – Checklist for the RFO). Could you please confirm how our proposal should be organized?

Answer: Vendors must ensure that all mandatory requirements for this RFO are met per Bid Package 1, Section 4.7.1, even if they are not included in this checklist in Exhibit A, 16. Vendor must upload all required documents through the BidStamp VIS portal. A specific order of documents is not required.

57. **Question:** Reference document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page: 3, Section: 1.2.6 Current Contracts. DIR currently has multiple contracts with 14 Vendors to provide Managed Print Services, Printers, Copiers, 3D and Scanning Equipment and Related Services. This RFO encompasses term contracts that are administered by The Comptroller of Public Accounts (CPA) Statewide Procurement Division (SPD) for Document Imaging Services. Enterprise Content Management (ECM) Products, Software and Services is a new category.”

Will stand-alone contracts for software, Imaging and ECM remain active or be phased out? Can components from existing independent contracts be incorporated into an MPS solution or must they also receive an award under DIR-TSO-TMP-419?

Answer: Components from existing contracts cannot be incorporated into an MPS solution. DIR-TSO-TMP-419 is a new solicitation and has no relation to the existing contracts.

58. **Question:** Document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page: 16, Section: 3.1 Products Enterprise Content Management (ECM)

Products may include Content Services Platform (CSP) which is a set of services and microservices, embodied either as an integrated product suite or as separate applications that share common APIs and repositories, to exploit diverse content



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types and to serve multiple constituencies and numerous use cases across an organization. This kind of platform can be delivered as an integrated product suite or as separate applications that have similar APIs and repositories. The changes in this space represent a shift from self-contained systems and repositories to open services.

Can components from existing DIR contracts be incorporated into an ECM solution or must they also receive an award under this contract?

Answer: ECM has a Related Services element; if the Vendor offers a Related Service to an ECM product, it should be listed in the Entire Product Offering-ECM (Tab 5) of the Pricing Index. Additionally, refer to the Answer to Question 56 above and Bid Package 1, Section 3. Scope.

59. **Question:** Page 5 / Section 3.1. Please confirm that we can include products already existing in other contracts we want included in this contract.

Answer: A Vendor may propose any product and/or services that are listed in Bid Package 1, Section 3. Scope. In addition, the Pricing Index has a category titled Miscellaneous/Other for items that are not listed in Bid Package 1, Section 3. Scope, but are within the scope of the solicitation.

60. **Question:** Bid Package 1 RFO- Section 3.1 Scope Under Scope there are three categories listed, MPS, Document Imaging Services and Enterprise Content Management. Does the Section Under MPS allow for outright purchase of devices, (scanner, printer, MFP's, facsimile devices etc.) Section 3.1 page 10 references copiers, printers, and scanners.

Answer: Yes, direct purchases may be offered for this solicitation.

61. **Question:** Document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page:5, Section: 3.1 Products

Vendors may not propose or provide remanufactured, like-new, newly manufactured, refurbished, reconditioned or any other than NEW products or equipment, to include add-on products.

Vendors use different nomenclatures to label their equipment. Please confirm your acceptance of this definition of manufacturing status as follows: None of the equipment provided will be remanufactured, reconditioned, recycled, refurbished,



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or used, although the equipment may contain some recycled components that meet new parts performance standards. Regardless of which model of new equipment is being provided, the District will be the first user of the equipment.”

Answer: DIR does not accept the definition above. The scope is defined in Bid Package 1, Section 3.1. Vendors shall propose new products only.

- 62. Question:** Document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page:5, Section Number 3.1 Products.

Regarding Equipment Manufacturing status. Does DIR have any issues with the equipment manufacturing definition? Equipment manufacturing status may change during the life of the equipment. For equipment that is included in the DIR Final Award, what are the ramifications if equipment manufacturing status changes during the term of the contract?

Answer: If the life cycle of a product ends during the term of the contract, the Vendor may add the new version of the product to their existing contract.

- 63. Question:** Document: DIR-TSO-TMP-419 Bid Package 1 RFO, Page:6, Section: 3.1 Declared Disaster Optional Declared Disaster Equipment Recovery Program. If a vendor elects to participate in the disaster recovery program, must the service be offered on every device in the portfolio or can it be on a subset of available devices?

Answer: All products within the Optional Declared Disaster Equipment Recovery Program for 48 or 60 month leases must be offered. Vendors may elect to only offer their 60 month lease portfolio and/or their 48 month lease portfolio, however, a 48 month portfolio may not be offered without a 60 month lease portfolio.

- 64. Question:** DIR-TSO-TMP-419- Bid Package 1 RFO- pg. 12, Consumables Supply Services-2. Would DIR consider the addition of the following language into 3.1 Products, Managed Print Services Examples, Consumable Supply Services: "This requirement does not apply to 3D systems. Customers shall order these supplies on an as needed basis."

Answer: No. For 3D Printers it is intended that the Vendor list the equipment and any accessories that they offer on separate lines; refer to Bid Package 1, Section 3. Scope.



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65. **Question:** Would it be possible to use a different font and/or color for our answers for the Exhibits so it is easier to differentiate between the Texas DIR questions and our responses?

Answer: Yes, as long as it is clear, and meets accessibility requirements. Vendor response documents should be submitted in a format that is accessible to people with disabilities. Vendor should refer to Bid Package 1, Section 4.7.3.

66. **Question:** DIR-TSO-TMP-419- Bid Package 1 RFO-Exhibit A- Item 10- Question ten of the DIR-TSO-TMP-419-Bid Package 1 RFO- Exhibit A, directs vendors to Bid package 5 for vendor reference questionnaire instructions, however the Vendor references are located in Bid Package 8. Please confirm that this question was meant to state Bid Package 8.

Answer: Yes, Bid Package 8 is titled Vendor References; refer to the Answer to Question 3 above.

67. **Question:** Exhibit A: Page 26/28: Section 11.B Termination, Item 3-Termination for Convenience - DIR may terminate the Contract, in whole or in part, by giving the other party thirty (30) calendar days written notice. A Customer may terminate a Purchase Order or other contractual document or relationship by giving the other party thirty (30) calendar days written notice.

Will DIR clarify that this term/condition does not apply to any and all executed lease agreements under this contract and only applies to the actual contract award?

Answer: If a Vendor offers to lease equipment on a DIR contract that is awarded to them, they will be bound first, to the terms and conditions of either the Master Operating Lease Agreement or Master Lease Agreement (MOLAs or MLAs, respectively) and then Bid Package 4 Standard Terms and Conditions.

68. **Question:** DIR-TSO-TMP-419- Bid Package 2- 11.B.3- DIR-TSO-TMP-419- Bid Package 2- 11.B.3 states, " DIR may terminate the Contract, in whole or in part, by giving the other party thirty (30) calendar days written notice. A Customer may terminate a Purchase Order or other contractual document or relationship by giving the other party thirty (30) calendar days written notice. " Please clarify that this section only applies to the documents listed above and not the underlying lease agreements for the installed equipment.



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Answer: Refer to the Answer to Question 67 above.

69. **Question:** Exhibit A Attachment 2 “This form must be completed/signed by respondent for each identified reference (cancelled contract references)”. Can you please clarify what “cancelled contract references” means? Is this applicable only if a vendor’s reference is from a cancelled contract?

Answer: The Vendor shall complete Exhibit A Attachment 2 if the Vendor has a cancelled contract. If Vendor has a cancelled contract, DIR requires a Point of Contact (POC) for that contract.

70. **Question:** Referencing Bid Package 2 – Pricing Index: TAB 2: Bid Stamp Price Sheet: Does DIR wish for responding vendors to delete information provided as “examples” and enter response data/pricing applicable to request?

Answer: Bid Package 2, Tab 2 lists examples and is provided as a reference only. Vendor must submit Tab 2 items in the automated BidStamp Pricing form.

71. **Question:** Referencing Bid Package 2 – Pricing Index: TAB 2: Bid Stamp Price Sheet: Column D: Products/ Services Sub Description: Are vendors to create their own configurations or will DIR be providing minimum configurations for each of the volume bands requested? If there will be no minimum configuration requirements, are vendors to supply base unit pricing only and list every accessory item available separately?

Answer: The requirement within each Volume Band should be the lowest price of the base model equipment. Bid Package 2 Pricing Index Tab 2 does not require pricing for accessories.

72. **Question:** Document: DIR-TSO-TMP-419 Bid Package 2 Pricing Index, Section: Tab #2, MFD Copier/Printer Maintenance Plans/Prices. Where would an alternative price plan such as equipment flexible Rental program be placed on the price exhibit?

Answer: If a Vendor offers the rental of equipment, they shall submit a detailed description of the products/services in the Miscellaenous/Other category of Tab 3 – Entire Product Offering-MPS.



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73. **Question:** Document: DIR-TSO-TMP-419 Bid Package 2 Pricing Index, Section: Tab #2, "Product Services Description"

Are there any other minimum specification or requirements other than the stated speed band?

Answer: No, the specifications and requirements are as defined in Bid Package 2 Pricing Index (Tab 2).

74. **Question:** Referencing Bid Package 2 – Based on the format on Tab 3 Entire Product Offering – MPS, how will DIR / Customer determine what accessories go with what models since the accessories are at the bottom of the page and not listed or requested within the volume bands of the MPS equipment?

Answer: If an accessory is sold separately it should be listed in the Accessories section. If it is part of a copier (configured component) it should be detailed in the Product Description. Refer to the examples in Bid Package 2, Entire Product Offering-MPS (Tab 3).

75. **Question:** DIR-TSO-TMP-419- Bid Package 2 Pricing Index- 3. Please clarify where DIR would prefer Vendors to include their CPC rates in the pricing submission on the BidStamp portal.

Answer: DIR does not require the submission of Cost per Click (CPC) rates in Vendor response to DIR-TSO-TMP-419. Copy allowances and CPC rates will be determined at the time of Negotiations.

76. **Question:** Document: DIR-TSO-TMP-419 Bid Package 2 Pricing Index, Section: Tab #4, MFD Copier/Printer Maintenance Plans/Prices

MFD Copier/Printer Maintenance Plans/Prices - Is there a requirement and/or opportunity to include multiple equipment service options/plans (copy allowances etc.? Where would we put those in the price exhibit?

Answer: Maintenance should be submitted in the *Managed Print Services, Related Services* section of Bid Package 2 Pricing Index, Entire Product Offering -MPS (Tab 3). Refer to the Answer to Question 74 above.



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77. **Question:** DIR-TSO-TMP-419- Bid Package 2 Pricing Index-. If it is the intent of DIR to allow standalone software components, how should vendor's calculate ECM and software lease rates to submit as part of the response?

Answer: In regards to stand alone components, refer to the Answers to Questions 18 and 19 above. If the Vendor offers the lease of software it should be **detailed** in the Entire Product Offering-ECM (Tab 5), Miscellaneous/Other section.

78. **Question:** Bid Package 1 - RFO- SCOPE 3.1 Products - Does this offering include the options for outright purchase of supplies? If so, would these be entered under the miscellaneous/other category on the pricing template?

Answer: Supplies/Accessories should be listed in Entire Product Offering-MPS (Tab 3) under Accessories. Consumable products such as toner, and paper offered as standalone products are outside the scope of this RFO.

79. **Question:** Referencing Bid Package 2 – How are vendors to provide variably monthly lease rates/pricing? There is only one column provided for one monthly lease payment. (ie: FMV, Standard \$1.00 Out, Tax Exempt Municipal Lease, etc.)

Answer: The Percent (%) Discount off MSRP that is offered at the time of proposal (if accepted) will remain fixed throughout the term of the contract. The MSRP may vary according to the manufacturer's published suggested retail price.

80. **Question:** Referencing Bid Package 2 – Where does DIR wish for vendors to provide accessory pricing on tab 2 Bid stamp price sheet?

Answer: If an accessory is sold separately it should be listed in the Accessories section in Bid Package 2, Entire Product Offering-MPS (Tab 3). If it is part of a copier (configured component) it should be detailed in the Product Description. Refer to the examples in Bid Package 2, Entire Product Offering-MPS (Tab 3). Bid Package 2, Tab 2 lists examples and is provided as a reference only. Vendor must submit Tab 2 items in the automated BidStamp Pricing form.



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- 81. Question:** Bid Package 2 Pricing Index - On the pricing index spreadsheet can you clarify where one would enter the pricing for those devices that would be an outright purchase.

Answer: Vendors should list their product offering in Bid Package 2, in the appropriate Entire Product Offering (Tab 3, Tab 4 and/or Tab 5). All items listed are for purchase unless otherwise indicated (as a lease).

- 82. Question:** Referencing Bid Package 2 – Where does DIR wish for vendors to provide both mono and color cost maintenance rates for proposed MFD's? How does DIR wish for vendors to provide or present maintenance pricing (cost per print or monthly volume inclusive maintenance programs, etc.).

Answer: To distinguish pricing between Mono and Color, they should be listed in separate rows. Refer to the Answers to Questions 77 and 78 above.

- 83. Question:** Document: DIR-TSO-TMP-419 Bid Package 2 Pricing Index, Section: Tab#6, "Volume Discounts"

Volume Discounts – Are the Quantity Bands/Revenue amounts/discount bands for volume discounts stated in the Price Exhibit examples and is it up to the vendor to determine/propose "Bulk Buy" discount criteria. Is the vendor limited to the specifics of the example included in TAB#6?

Answer: It is up to the Vendor to determine/propose volume discount and discount criteria in the Volume Discount – (Tab 6).

- 84. Question:** Referencing Bid Package 2 – TAB 6. Volume Discount: Are the quantities listed examples or actual ranges DIR wishes vendors to respond to? If only examples, are vendors to provide their own quantity ranges and applicable discounts?

Answer: The quantities listed are example and the Vendor will determine/propose volume discount and discount criteria in the Volume Discount – (Tab 6).

- 85. Question:** Referencing Bid Package 2 – TAB 6. Volume Discount/ "Additional Discount Based on Aggregate Sales": Is this item a requirement or optional?

Answer: Bid Package 2 Pricing Index, Volume Discount (Tab 6) is optional.



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86. **Question:** bid package 4, section B - would DIR consider modifying the reporting requirements to simplify the process?

Answer: DIR will not modify the reporting process in Bid Package 4, Standard Terms and Conditions, Section 9. Contract Administration, B. Reporting and Administrative Fees, 2) Detailed Monthly Report.

87. **Question:** DIR-TSO-TMP-419 Bid Package 4 Appendix, pg. 32- 1. Please clarify if force majeure would apply to equipment payments, or would only payment for service be suspended?

Answer: As it applies to Bid Package 1, Standard Terms and Conditions, Section 11. Contract Enforcement, C. Force Majeure, all payments due from the Customer during the Force Majeure term will be suspended.

88. **Question:** Bid Package 8 - References - Can references includes companies / agencies outside of TX?

Answer: Yes, the Vendor selects the Reference then submits Bid Package 8 to the selected Reference.

End of Addendum 1

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Vendor Conference Sign-in Sheet
December 21, 2018 / 9:00 A.M. (CT)

REPRESENTATIVE	COMPANY NAME	E-MAIL ADDRESS	HUB STATUS
Webinar - Edgar Antu	Strategic Partnerships, Inc	Eantu04@gmail.com	Yes
Webinar - Debb Atnip	CDWG	Debb.atnip@cdw.com	No
Webinar - Kevin Brooks	CTI – Cartridge Technologies	kevinb@ctimd.com	N/A
Webinar - Juan Celaya	Compu-Date International, LLC	icelaya@cdlac.com	Yes
Webinar - Juanco Celaya	Compu-Date International, LLC	jjicelaya@cdlac.com	Yes
Webinar - Jim Connolly	Xerox Corporation	James.connolly@xerox.com	No
Webinar - Ed Detwiler	NPC, Inc.	Ed.detwiler@npcweb.com	No
Webinar - Demetra Dickens	Kodak Alaris	Demetra.dickens@kodakalaris.com	No
Webinar - Scott Gorman	Xerox Corporation	Scott.gorman@xerox.com	No
Webinar - Tom Hay	DIR	Tom.hay@dir.texas.gov	No
Webinar - Bill Knapp	Compu-Data International, LLC	bknappp@cdlac.com	Yes

REPRESENTATIVE	COMPANY NAME	E-MAIL ADDRESS	HUB STATUS
Webinar - Jeremy Knott	NPC	Jeremy.knott@npcweb.com	No

Webinar - Elizabeth Lopez	DIR	Elizabeth.lopez@dir.texas.gov	No
Webinar - Thomas Mandell	Xerox Corporation	Thomas.mandell@xerox.com	No
Webinar - Darren Morlando	Xerox Corporation	Darren.morlando@xerox.com	No
Webinar - Rasa Myers	Xerox Corporation	Rasa.myers@xerox.com	No
Webinar - John Paider	HMB	jpsifrt@hmbnrt.vom	zno
Webinar - Michelle Passarell	Xerox Corporation	Michelle.passarel@xerox.com	No
Webinar - Jerry Roberts	Muratec America	jroberts@muratec.com	No
Webinar - Ann Russo	Xerox Corporation	Ann.russo@xerox.com	No
Webinar - Blair Shaw	Ricoh	Blair.shaw@ricoh-usa.com	No
Webinar - Talan Tyminski	Strategic Partnerships Inc.	ttyminski@partnerships.com	No
Webinar - Will Waterall	Precision Products, Inc.	waterall@precisionproducts.com	No
Webinar - Joe Yankle	Kodak Alaris	Joseph.yankle@kodakalaris.com	No
Webinar - Geri Pomerantz	Xerox Corporation	Geri.pomerantz@xerox.com	No
Webinar - Michael Wright	Canon USA Inc.	mwright@cusa.canon.com	No
Webinar - Anastasia Foerscher	Carahsoft Technology Corp.	Anastasia.foerschner@carahsoft.com	No
Webinar - Ed Friel	Canon USA Inc.	efriel@cusa.canon.com	No
Webinar - Tammy Leger	Xerox Corporation	Tammy.leger@xerox.com	No

Mandy Hayden	Neubus, Inc.	mhayden@neubus.com	No
Chris Albury	Neubus, Inc.	calbury@neubus.com	No
I-Hsing Tsao	Neubus, Inc.	itsao@neubus.com	No
Tommy Tsaboukos	Kodak Alaris	Tommy.tsaboukos@kodakalaris.com	No
Tochukwu Okonkwor	Xyples, LLC	tokonkwor@xyples.com	Yes
Pat Acosta	Xerox	Pat.acosta@xerox.com	No

**Managed Print Services, Printers, Copiers, 3D printers and
Scanning & Plotting Equipment and Related Services;
Document Imaging Services/Solutions; Enterprise Content
Management Products, Software and Services
Request for Offer DIR-TSO-TMP-419**

**Vendor Pre-Bid Conference
December 21, 2018
9:00 – 11:00 (CT)**




DIR
Texas Department of Information Resources

Agency ID: 41924 Pre-Bid Conference Presentation Slides 2018

1

Introduction



<p>Linda Hart, DIR Phyllis Benitez, DIR Ray Infante, DIR</p> <hr/> <p>Contract Manager Chief Procurement Office</p>	<p>Jeff Kline, DIR</p> <hr/> <p>Program Director Statewide EIR Accessibility</p>
<p>Kelly Parker, DIR</p> <hr/> <p>Director, Cooperative Contracts Chief Procurement Office</p>	<p>CPO Staff, DIR</p> <hr/> <p>Webinar Coordinator Chief Procurement Office</p>

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Agenda



- General Information
- BidStamp Vendor Information System Portal (VIS) Overview
- Request for Offer (RFO)
 - RFO Overview
 - RFO Scope
 - RFO Schedule
 - RFO Contents
 - Mandatory Submissions
 - Evaluation Criteria
- Break
- Questions
- Conference Closing

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General Information



- Reference the RFO page number and Section number when submitting questions.
- **Webinar participants may submit questions electronically at anytime during the webinar, please use the question tab.**
- Questions answered today are unofficial until posted on the ESBD in the form of an Addendum.
- Check the ESBD often for updates
- All questions regarding this RFO must be **submitted in writing through the BidStamp Vendor Information System Portal (VIS)** by 2:00 P.M. (CT), January 7, 2019.

4

General Information (continued)



- **Disqualification of Offers**
 - Failure to sign, scan and upload Vendor Information Form (Exhibit A)
 - Failure to complete Financial Information (DUNS Number)
 - Failure to complete, sign, scan and upload the Historically Underutilized Business (HUB) Subcontracting Plan (HSP)
 - Failure to submit on or before due date and time
 - Contact with DIR employees regarding this RFO other than designated contacts

- **Delivery of Offers**
 - **Any Vendor responding to this RFO must submit their response through the BidStamp VIS.**

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General Information (continued)



Vendors and all vendor representatives shall not attempt to discuss the contents of this RFO with any employees or representatives of DIR other than designated contacts. Failure to observe this restriction may result in disqualification of any related Response.

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General Information (continued)

Contacts for inquiries regarding this RFO

Carrie Thomas – carrie.thomas@dir.texas.gov

Contacts for the following related topics:

Vendor Information Systems (VIS) Portal - BidStamp: Kelly Parker – kelly.parker@dir.texas.gov
or Joan Scott – joan.scott@dir.texas.gov

HUB Subcontracting Plan: Lynn Sanchez (512) 463-9813 – dir.hub@dir.texas.gov
Theresa Williamson (512) 475-4638 – dir.hub@dir.texas.gov

Statewide Electronic and Information Resources (EIR) Accessibility: Jeff Kline – (512) 463-3248 - jeff.kline@dir.texas.gov

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DIR Cooperative Contracts

- DIR combines the buying power of DIR Customers to obtain volume-discounted pricing for IT products and services.
- Customer purchases through the Cooperative Contracts Program resulted approximately \$5 billion for fiscal years FY2016 – FY2018. See Bid Package 1, Section 1.2.5, Historical Sales.

	FY2016	FY2017	FY2018
Assistance Org	\$2,357,384.76	\$3,079,520.73	\$2,958,084.65
Higher Ed	\$351,693,838.26	\$339,061,683.43	\$332,385,633.15
K-12	\$628,316,299.13	\$577,352,825.09	\$589,442,854.33
Local Government	\$462,736,727.05	\$461,433,333.12	\$448,209,464.71
Out of State	\$8,767,492.85	\$20,451,872.88	\$19,245,239.18
State Agency	\$515,716,174.70	\$492,221,768.72	\$415,604,984.31
Total:	\$1,969,587,916.75	\$1,893,601,003.97	\$1,807,846,260.33

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Threshold and SOW Requirements



Beginning September 1, 2017, the Threshold Requirements for IT Commodities (Hardware, Software and Services) are as follows:

Contract Value	Number of DIR Vendors
\$50,000 or less	May award directly to DIR Vendor of choice
More than \$50,000 but not more than \$1 million	Three (or all DIR Vendors in a category with less than three vendors)
More than \$1 million but less than \$5 million	Six (or all DIR Vendors in a category with less than six vendors)
More than \$5,000,000	Agencies must conduct an independent procurement and cannot use DIR Cooperative Contracts

State agencies procuring more than \$50,000 worth of services from DIR Contracts must submit their draft and final Statements of Work to DIR for review and approval prior to making payment to a Vendor.

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Bid Submittal / VIS



- Any Vendor responding to this RFO must submit their response through the BidStamp Vendor Information System (VIS)
- Before users can access any of the BidStamp VIS portal functionality, they will be required to provide login credentials to access a new or existing account. Vendors will access the BidStamp VIS Portal via <http://dircommunity.force.com/BidStamp> and enter in their access credentials.
- If a Vendor does not yet have login credentials, Vendor will request one by clicking on "Are you a vendor and need to request an account?" button that is located on the login page.

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Bid Submittal



- Persons with disabilities who seek accommodation, under the Americans with Disabilities Act (ADA), in responding to this solicitation may contact DIR at the point of contact in section 4.1 of this solicitation. Please allow at least five business days for response.

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Responding to a Solicitation




After Vendor account is enabled, Vendor will submit and manage RFO responses from the BidStamp VIS portal.

The Vendor BidStamp Guide and the presentation are posted on DIR's website on the Information For Vendors page.

<http://dir.texas.gov/View-Information-For-Vendors/Landing.aspx>


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Creating a New Response



To create a new response:

1. Log in to the VIS portal and select the "Open Solicitations" tile
2. Click on the "RFO Number" (**DIR-TSO-TMP-419**) of the solicitation you want to respond to
3. You will be navigated to the "RFO Number" detail page




[My Account](#)
[Solicitations](#)
[Responses](#)
[Log out](#)


All Open Solicitations

RFO Number	RFO Description	Solicitation Status	Phase	Type	Date/Time Respo...	Question Submi...
DIR-TSO-TMP-289	testMadan	Posted	RFI - Posted	Cooperative	5/24/2017 9:18 AM	4/30/2017 9:18 AM
DIR-TSO-TMP-287	test	Posted	Posting	Cooperative	11/8/2017 9:49 AM	1/9/2017 6:13 AM
DIR-TSO-TMP-293	Request for Wdg...	Posted	Posting	Cooperative	3/31/2017 10:24 AM	3/15/2017 9:52 PM
DIR-TSO-TMP-295	Test RFO Title	Draft	Posting	Cooperative	3/31/2017 2:11 PM	3/13/2017 2:13 PM
DIR-TSO-TMP-296	Del-branded Prod...	Posted	Posting	Cooperative	4/30/2017 1:47 PM	3/17/2017 10:01 AM
DIR-TSO-TMP-297	RFO		Posting	Cooperative	3/15/2018 6:32 AM	

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Creating a New Response, cont.





[My Account](#)
[Solicitations](#)
[Responses](#)
[Log out](#)

RFO Number
DIR-TSO-TMP-473

RFO Number Detail

[Respond To Solicitation](#)
[Ask A Question](#)
[Subscribe to Solicitation](#)
[View Solicitation Documents](#)


Actual Start Date Posting	5/15/2017	Vendor Conference Date	5/25/2017 2:00 PM
Question Submission Deadline Date	5/31/2017 2:00 PM	RFO Answers to Questions Deadline Date	6/7/2017 5:00 PM
Date/Time Responses Due	6/15/2018 2:00 PM	Actual Start Date Evaluation	6/16/2017

New Fields

Solicitation Status	Posted	Type	Cooperative
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RFO Questions

No records to display

This page will display important deadlines for the solicitation and list any questions Vendor has submitted. Buttons discussed on the next slide. 

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Creating a New Response, cont.




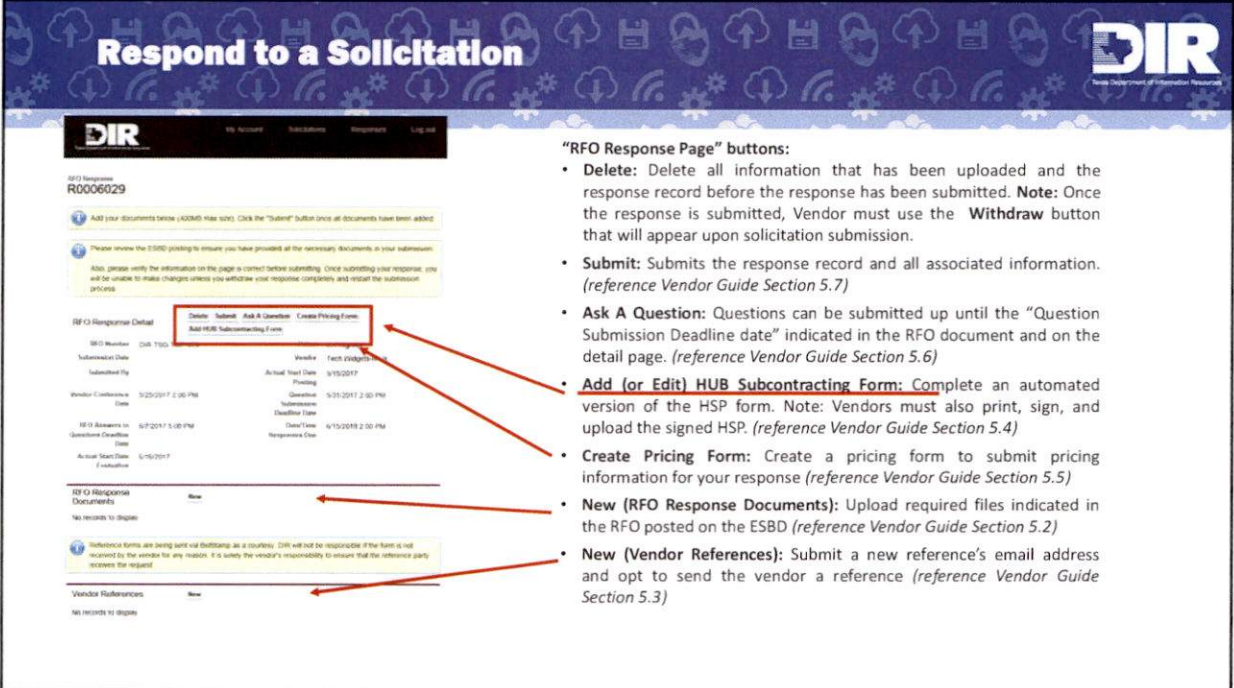
RFO Number Detail Button Description:

- Respond to a Solicitation (or View Response):** Create a new response or view a response that is in-progress. If a response has already been created or started, this button will read as **“View Response”** and allow you to resume your progress on an existing RFO response.
- Ask A Question:** Submit a question to be reviewed by a DIR resource. Questions can be submitted up until the **“Question Submission Deadline date”** indicated in the RFO document and on the detail page.
- Subscribe to Solicitation:** Subscribe to a solicitation if you would like to receive addendum notifications. To subscribe to the solicitation, you must select the **“Subscribe to Solicitation”** button AND have enabled your contact to **“Receive Notifications”**.
- View Solicitation Documents:** Navigate to the ESBD posting for a solicitation and view the solicitation’s documents.

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Respond to a Solicitation





“RFO Response Page” buttons:

- Delete:** Delete all information that has been uploaded and the response record before the response has been submitted. **Note:** Once the response is submitted, Vendor must use the **Withdraw** button that will appear upon solicitation submission.
- Submit:** Submits the response record and all associated information. (*reference Vendor Guide Section 5.7*)
- Ask A Question:** Questions can be submitted up until the **“Question Submission Deadline date”** indicated in the RFO document and on the detail page. (*reference Vendor Guide Section 5.6*)
- Add (or Edit) HUB Subcontracting Form:** Complete an automated version of the HSP form. Note: Vendors must also print, sign, and upload the signed HSP. (*reference Vendor Guide Section 5.4*)
- Create Pricing Form:** Create a pricing form to submit pricing information for your response (*reference Vendor Guide Section 5.5*)
- New (RFO Response Documents):** Upload required files indicated in the RFO posted on the ESBD (*reference Vendor Guide Section 5.2*)
- New (Vendor References):** Submit a new reference’s email address and opt to send the vendor a reference (*reference Vendor Guide Section 5.3*)

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