FIN19001-REVENUE

Integrated Revenue Administration System
Pre-Bid Conference
Agenda

AUGUST 21, 2PM

- Kickoff
- Procurement (5-10 Min)
- Project Overview (5 min)
- Introduction & Project Organization (5 Min)
- Technical Overview (10-15 Min)
- Proposal Instructions (5 Min)
- Timeline (3 Min)
- Q&A
Procurement Overview

GOVERNMENT SUPPORT SERVICES

• Overview
• Process
• Timeline
• Restrictions
• Communications

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Project Overview

DIVISION OF REVENUE

- Tax Overview
  - Income
  - Business
  - Trust Fund

- Organization Overview

- High-level Goals
  - Replace Tax Processing
  - Optimize Business Processes
  - Increase Revenue Collection
  - Improve Reporting and Analytics
  - Adopt Best Practices
  - Expand and Enhance Fraud Processes

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Introduction & Project Organization

- Rick Geisenberger (Cabinet Secretary)
- Rebecca Goldsmith (Deputy Secretary)
- Jennifer Hudson (Director of Revenue)
- Mike Womer (Technology Executive)
- Kathy Revel (State Product Owner)
- Charles Campbell-King (Deputy Director)
- Bob Devestine (State Project Director)
- Pete DeYoe (State Project Manager)
- Daniel Forsee (State Project Manager)
Technical Overview

• Project Organization
• Overview of RFP sections
  • Mandatory Requirements
  • Sections Overview
  • No Cost Except in Attachment 9
  • How to Highlight Exceptions
  • Scoring Overview
• Anticipated Project Releases and Phases

• Technical Goals
• Hosted / On-Premise
• Post-Deployment & Product Support
• Data Collection/Reporting
• Adaptability
• Minimal Customization
• Centralized Case Management
• Compliance
• Process Automation / Workflow
• Self-Service Enhancements
• Content Management
• Disaster Recovery / Business Continuity
Proposal Response Instructions

RESPONSE ATTACHMENTS

Vendor Solution Overview and Profile Information Response

• 1.1 State of DE–DOR Transmittal Letter
• 1.2 State of DE–DOR Executive Summary
• 2 State of DE–DOR Vendor Profile (Form included as Attachment 2)
• 2.1 State of DE-DOR Vendor Organization
• 2.2 State of DE-DOR Vendor Financials
• 2.3 Business References (Form included as Attachment 2.3 in RFP)
• 2.4 State of DE-DOR Certificate of Good Standing
• 2.5 Subcontractor Information Form (Form included as Attachment 2.5 in RFP)

Vendor Response to IRAS Requirements

• 3 State of DE–DOR Business Requirements (Response spreadsheet included as Attachment 3 – Return in .xlsx format)
• 4 State of DE–DOR Technical Requirements (Response spreadsheet included as Attachment 4 – Return in .xlsx format)
• 5 State of DE–DOR Project Management and Related Requirements (Response spreadsheet included as Attachment 5 – Return in .xlsx format)
• 11 Mandatory Requirements (Response spreadsheet included as Attachment 7 – Return in .xlsx format)
Proposal Response Instructions

RESPONSE ATTACHMENTS

Vendor Response to IRAS Project Approach and Plan

• 6 State of DE-DOR Project Approach
• 7 State of DE-DOR Staffing Requirements (Response spreadsheet included as Attachment 7 – Return in .xlsx format)
• 8 State of DE-DOR Project Plan

Vendor Response to Cost Requirements

• 9 State of DE-DOR Cost Proposal (Response spreadsheet included as Attachment 9 – Return in .xlsx format)

Vendor Response – Standard Procurement Forms

• 10.1 No Proposal Reply Form (Included in RFP as Attachment 10.1 – Return in .pdf format)
• 10.2 Non-Collusion Statement (Included in RFP as Attachment 10.2 – Return in .pdf format)
• 10.3 Exceptions (Included in RFP as Attachment 10.3 – Return in .pdf format)
• 10.4 Confidentiality and Proprietary Information (Included in RFP as Attachment 10.4 – Return in .pdf format)
• 10.5 Office of Supplier Diversity Application (Included in RFP as Attachment 10.5 – Return in .pdf format)
Proposal Response Instructions

RESPONSE ATTACHMENTS

Vendor Optional Response – Unclaimed Property

• 12 Unclaimed Property Questions (Included in RFP as Attachment 12 – Return in .pdf format)

Vendor Response – Department of Technology and Information (DTI) Requirements

• 13 Department of Technology and Information Requirements (Acknowledge agreement to the DTI Requirements in the vendor’s cover letter)

• 14 Delaware Cloud Services Terms and Conditions Agreement (Included in RFP as Attachment 14 – Return in .pdf format)

• 15 Data Usage Terms and Conditions (Included in RFP as Attachment 15 – Return in .pdf format)