REQUEST FOR PROPOSAL

No. FY22-25698

Financial System Implementation – Project Manager

November 2021
Table of Contents

1. INTRODUCTION ........................................................................................................................................... 1
  1.1. PURPOSE AND BACKGROUND ........................................................................................................... 1
  1.2. OBJECTIVE ............................................................................................................................................... 1
  1.3. MINIMUM QUALIFICATIONS ................................................................................................................. 1
  1.4. PERIOD OF PERFORMANCE ................................................................................................................ 1

2. GENERAL INFORMATION ............................................................................................................................. 1
  2.1. RFP COORDINATOR ............................................................................................................................. 1
  2.2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES .................................................................. 2
  2.3. SUBMISSION OF PROPOSAL ................................................................................................................ 2
  2.4. SUBMISSION OF QUESTIONS ............................................................................................................... 2
  2.5. ACCEPTANCE PERIOD ........................................................................................................................ 3
  2.6. RESPONSIVENESS .................................................................................................................................. 3
  2.7. MOST FAVORABLE TERMS .................................................................................................................. 3
  2.8. GENERAL TERMS AND CONDITIONS ............................................................................................... 3
  2.9. COSTS TO PROPOSE .......................................................................................................................... 3
  2.10. NO OBLIGATION TO CONTRACT ....................................................................................................... 3

3. SCOPE OF SERVICES/STATEMENT OF WORK ......................................................................................... 4
  3.1. Summary ................................................................................................................................................. 4
  3.2. Task Details ............................................................................................................................................ 4
    3.2.1. Internal System Review .................................................................................................................. 4
    3.2.2. RFP Development and Evaluation ............................................................................................... 4
  3.2.3 Manage Implementation ..................................................................................................................... 5
  3.2.4 Testing ................................................................................................................................................ 5
  3.2.5 Training and Go Live ........................................................................................................................ 5
  3.3. Deliverables ........................................................................................................................................... 5
  3.4. Additional Qualifications ..................................................................................................................... 5
  3.5. PROPOSAL AND PRICING INSTRUCTIONS ..................................................................................... 6

4. EVALUATION AND CONTRACT AWARD .................................................................................................... 7
  4.1. EVALUATION PROCEDURE ............................................................................................................... 7

EXHIBIT A - CERTIFICATIONS AND ASSURANCES ...................................................................................... 8
EXHIBIT B-CERTIFICATION OF DEBAREMENT ............................................................................................ 9
1. INTRODUCTION

1.1. PURPOSE AND BACKGROUND

The American Association of Motor Vehicle Administrators, hereafter “AAMVA,” is initiating this Request for Proposal (RFP) to solicit Proposals from qualified firms interested in participating in the bidding process.

AAMVA is a tax-exempt, nonprofit organization developing model programs in motor vehicle administration, law enforcement, and highway safety. The association also serves as an information clearinghouse in these areas and acts as the international spokesman for these interests.

Founded in 1933, AAMVA represents the state and provincial and territorial officials in the United States and Canada who administer and enforce motor vehicle laws. AAMVA’s programs encourage uniformity and reciprocity among the states and provinces. The association also serves as a liaison with other levels of government and the private sector. Its development and research activities provide guidelines for more effective public service. AAMVA’s membership includes associations, organizations, and businesses that share an interest in the association’s goals.

1.2. OBJECTIVE

This RFP allows AAMVA to select the most qualified vendor at the most competitive price.

1.3. MINIMUM QUALIFICATIONS

The vendor must have a minimum of 10 years of demonstrated experience with multiple modern integrated financial systems.

The candidate must be identified in the RFP with a curriculum vitae (CV) or Resume. An alternate, in case of unforeseen circumstances, must also be identified.

1.4. PERIOD OF PERFORMANCE

<table>
<thead>
<tr>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 2022</td>
<td>September 2023</td>
</tr>
</tbody>
</table>

2. GENERAL INFORMATION

2.1. RFP COORDINATOR

The RFP Coordinator is the sole point of contact in AAMVA for this procurement. All communication between the Offeror and AAMVA upon receipt of this RFP shall be with the RFP Coordinator, as follows:

<table>
<thead>
<tr>
<th>Name / Title</th>
<th>Alaster Sampson, Sr. Manager Procurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>4401 Wilson Boulevard, Suite 700</td>
</tr>
<tr>
<td>City, State, Zip Code</td>
<td>Arlington, Virginia 22203</td>
</tr>
<tr>
<td>Phone Number</td>
<td>703-908-5877</td>
</tr>
<tr>
<td>E-Mail Address</td>
<td><a href="mailto:procurement@aamva.org">procurement@aamva.org</a></td>
</tr>
</tbody>
</table>
Any other communication will be considered unofficial and non-binding on AAMVA. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Proposal.

2.2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue RFP</td>
<td>11/19/2021</td>
</tr>
<tr>
<td>Pre-Bid Meeting</td>
<td>12/1/2021 12:00PM-1:00PM Eastern</td>
</tr>
<tr>
<td>Questions Due</td>
<td>12/03/2021</td>
</tr>
<tr>
<td>Proposal Due</td>
<td>12/10/2021</td>
</tr>
<tr>
<td>Evaluate Proposal</td>
<td>12/24/2021</td>
</tr>
<tr>
<td>Oral Presentations</td>
<td>1/10-1/14/2022</td>
</tr>
<tr>
<td>Announce “Apparent Successful Contractor”</td>
<td>1/21/2022</td>
</tr>
<tr>
<td>Issue Purchase Order/Sign Contract</td>
<td>02/01/2022</td>
</tr>
</tbody>
</table>

Prebid meeting link

https://teams.microsoft.com/l/meetup-join/19%3ameeting_M2U5ODQ2MjMtYzQ1Ny00OWUSLjJNTMkMDkJMDk4ZTU2N2U4%40thread.v2/0?context=%7b%22Tid%22%3a%223a%22c4a5ff7a-f87c-4d21-a0d9-08a2ff3dbdc7%22%2c%22Oid%22%3a%22bdca0016-c8f6-4110-a0dd-1535d26ea59%22%7d

AAMVA reserves the right to revise the schedule above.

2.3. SUBMISSION OF PROPOSAL

The Proposal must be submitted in a PDF soft copy as set forth below.

The Proposal is to be sent to the RFP Coordinator at procurement@aamva.org noted in Section 2.1. The email should be clearly marked with the RFP Number to the attention of the RFP Coordinator: Alaster Sampson.

Example: Acme Proposal for RFP No. XYZ [date].pdf

Any modifications to a Proposal will be subject to these same conditions. The Proposal must respond to the RFP requirements. Do not respond by referring to material presented elsewhere. The Proposal must be complete and must stand on its own merits. Failure to respond to any portion of the RFP document may result in rejection of the Proposal as non-responsive. All Proposal and any accompanying documentation become the property of AAMVA and will not be returned.

2.4. SUBMISSION OF QUESTIONS

AAMVA will only accept written questions regarding the RFP. All questions must be emailed to procurement@aamva.org no later than the date provided in Section 2.2. AAMVA plans to provide all questions and responses under this RFP to vendors.
2.5. ACCEPTANCE PERIOD
Proposal shall remain valid for 120 calendar days from the date specified for receipt of offers, unless another time period is specified in an addendum to the RFP.

2.6. RESPONSIVENESS
The RFP Coordinator will review all proposals to determine compliance with administrative requirements and instructions specified in this RFP. The vendor is specifically notified that failure to comply with any part of the RFP may result in rejection of the Proposal as non-responsive. Procurement will notify the vendor if their proposal is determined to be non-responsive.

AAMVA also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

2.7. MOST FAVORABLE TERMS
AAMVA reserves the right to make an award without further discussion of the Proposal submitted. Therefore, the Proposal should be submitted initially with the most favorable terms which the contractor can propose. AAMVA does reserve the right to contact a contractor for clarification of its Proposal and request a face-to-face meeting.

The contractor should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. It is understood that the Proposal will become a part of the procurement file on this matter without obligation to AAMVA.

2.8. GENERAL TERMS AND CONDITIONS
The apparent successful contractor is expected to enter into a contract or purchase order with mutually acceptable terms and conditions. In no event can a contractor submit its own standard contract terms and conditions in response to this solicitation. The contractor may submit exceptions as allowed in Exhibit A - Certifications and Assurances. AAMVA will review requested exceptions and accept or reject the same at its sole discretion.

2.9. COSTS TO PROPOSE
AAMVA will not be liable for any costs incurred by the Offeror in preparing a Proposal submitted in response to this RFP, or in performing any other activities related to responding to this RFP.

2.10. NO OBLIGATION TO CONTRACT
This RFP does not obligate AAMVA to contract for the services specified herein. AAMVA reserves the right at its sole discretion, and without penalty, to reject any and all proposals received and not to issue a contract as a result of this RFP.
3. SCOPE OF SERVICES/STATEMENT OF WORK

3.1. Summary
AAMVA is issuing this request for proposal (“RFP”) for program management consulting services to assist in a Financial Systems Implementation (FSI) project. The tasks involved include, but are not limited to:

2. RFP Development and Evaluation - Assist in drafting the FSI project RFP(s), targeting available software vendors, and support the vendor selection process.
3. Manage the implementation process – Subsequent to the vendor selection process (whether new system(s) deployment, material system changes, or varied system integration changes), manage the vendor(s) execution.
4. Testing - Coordinate system testing and historical data integration
5. Training and go live – Coordinate training of stakeholders and deploy new system(s) into production

Note: For this RFP, AAMVA is NOT seeking a vendor that will sell the software or platform system. AAMVA is requesting services for third-party program Management support only.

3.2. Task Details

3.2.1. Internal System Review
AAMVA has previously contracted a third party, to review current needs for all backend financial applications utilized to complete the organization’s work. The assessment focused on reviewing the current processes to determine if present applications deployed met AAMVA’s needs, or if AAMVA should consider other software options.

Tasks completed by the third-party vendor:

- Conducted needs assessment for AAMVA’s financials systems
- Interviewed many stakeholders across the organization
- Developed system solution recommendations

Within this stage, vendors will be asked to review the previous deliverables (AAMVA Financial System Assessment Report & Functional Requirements) and if required, conduct additional interviews with existing AAMVA Finance/Accounting staff members.

3.2.2. RFP Development and Evaluation
Assist the FSI committee tasked with selecting the appropriate software application(s) in developing a quality RFP for submissions to applicable Accounting Software Providers.

Tasks to be completed:

- Detail the project scope based on AAMVA’s internally developed goals and needs,
- Draft technical requirements for Accounting Software Providers,
• Draft selection/evaluation criteria,
• Assist in cost estimation,
• Review questions received from potential contractors during the bidding process,
• Collect and coordinate evaluation scoring,
• Assist in the final vendor selection process (review submissions specifically for system feasibility, functionality, deployment timelines, etc.),
• Note: AAMVA will develop general Terms & Conditions of the RFP.

3.2.3 Manage Implementation
Overall project management, including facilitating all phases of third-party system integration/deployment.

Tasks to be completed:
• Coordinate kick-off meeting,
• Coordinate periodic stakeholder meetings & collaborative sessions through the implementation phase to ensure routine touchpoints,
• Manage Plan of Action & Milestones (POA&M) of third-party system provider(s),
• Ensure completion of the project on time, within scope, and within budget.

3.2.4 Testing
Schedule/coordinate Quality Assurance (QA) testing activities.

Tasks to be completed:
• Coordinate with FSI committee members and QA team on testing activities
• Track bugs and coordinate fixes with applicable stakeholders
• Confirm successful testing activities with applicable stakeholders

3.2.5 Training and Go Live
Tasks to be completed:
• Coordinate historical data scrub and integration
• Coordinate all training activities with end users
• Coordinate project wrap-up activities (go-live, lessons learned sessions, etc.)

3.3. Deliverables
• Overall Plan of Action and Milestones
• Monthly Status Reports
• Selected inputs for the FSI RFP
• End-user training materials

3.4. Additional Qualifications
• Knowledgeable about accounting (CPA desired)
• Strong business analytics and communication skills
• Familiar with new products/solutions and industry trends
• Knowledge about system integration in relation to various Federal Regulations (i.e., FAR, CFR) is a plus

3.5. PROPOSAL AND PRICING INSTRUCTIONS
Proposal should not exceed 20 pages total.

Past performance must include at least three (3) examples where your company has provided services similar in scope. Those references should include the following information

- Company name and at least one point of contact
- Project Scope
- Relevance to this solicitation
- Approach, including timeline and hours dedicated
- Any Challenges

Provide resumes or executive summaries of the individual(s) that would be assigned to the project.

Please provide the number of labor hours and the labor rates for each of the five phases of the project using the format in the pricing table shown below:

<table>
<thead>
<tr>
<th>Task</th>
<th>Labor Category</th>
<th>Estimated Hours</th>
<th>Hourly Rate</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal System Review</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RFP Development &amp; Evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementation Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Testing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training &amp; Go Live</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Costs (if applicable)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4. EVALUATION AND CONTRACT AWARD

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. Only responsive proposals which meet the minimum requirements will be forwarded to the evaluation team for further review.

4.1. EVALUATION PROCEDURE

Responsive proposals will be evaluated in accordance with the specifications stated in this solicitation and any addendum issued. Award will be made to the vendor that provides the best overall value to AAMVA.

<table>
<thead>
<tr>
<th>Eval No.</th>
<th>Description</th>
<th>Possible Points</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Financial history and capability</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total Possible Corporate Qualification Points</strong></td>
<td><strong>5</strong></td>
<td></td>
</tr>
<tr>
<td>2.1</td>
<td>Overall response to the RFP as per Section 3.1 above</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>2.2</td>
<td>Experience with Federal and SLED (State, Local Govt., and education) organizations</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>2.3</td>
<td>Past Performance examples and references</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>2.4</td>
<td>Oral Presentation</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total Possible Technical Points</strong></td>
<td><strong>65</strong></td>
<td></td>
</tr>
<tr>
<td>3.1</td>
<td>Overall Price</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>3.2</td>
<td>Favorable terms and conditions</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total Possible Price Points</strong></td>
<td><strong>30</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Grand Total Possible Points</strong></td>
<td><strong>100</strong></td>
<td></td>
</tr>
</tbody>
</table>
EXHIBIT A - CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which this Exhibit A is attached, understanding that the truthfulness of the facts affirmed herein and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 120 days following the due date for receipt of proposals, and it may be accepted by AAMVA without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of AAMVA whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official capacity. Any exceptions to these assurances are described in full detail on a separate page and attached to this document.
5. I/we understand that AAMVA will not reimburse any costs incurred in the preparation of this proposal. All proposals become the property of AAMVA and I/we claim no proprietary right to the ideas, writings, items, or samples presented in the proposal, unless so stated in the proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the consultant and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other consultant or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the consultant to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition. Further, you hereby certify you have no organizational or personal conflicts of interest with AAMVA on the purposed project after reviewing all organizational, personal, and third parties whom may be conducting business on the potential contract.

________________________________________________________
Signature of Offeror                                     Printed Name, Title and Date
EXHIBIT B-CERTIFICATION OF DEBAREMENT

The prospective vendor certifies to the best of its knowledge and belief that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;

2. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any department or agency of the Commonwealth of Virginia or any of the jurisdictions comprising the membership of the American Association of Motor Vehicle Administrators (AAMVA);

3. Have not within a three year period preceding this date been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

4. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated above of this certification; and

5. Have not within a three-year period preceding this date had one or more public transactions (Federal, State or local) terminated for cause or default.

Vendor understands that a false statement on this certification may be grounds for rejection of any submitted proposal or quotation or termination of any award. In addition, under 18 USC Sec. 1001, a false statement may result in a fine of up to $10,000 or imprisonment for up to 5 years, or both if federal funds are being used to support the procurement.

___________________________________________
Printed Name of Vendor

___________________________________________
Printed Name and Title of Authorized Representative

___________________________________________
Signature of Authorized Representative