

SWC #387 Managed Service Provider (MSP)
SOW Usage Instructions and Contact Information

Contract Period:

This is a three-year contract with two one-year renewal options. It began on March 1, 2022. The final end date if all renewal options are exercised will be February 28, 2027.

Summary/Background Information:

This contract is to enable agencies to engage in Projects-Based/Deliverables Staffing (Milestone, Independent Contractor (IC/1099) or fixed-bid based project deliverables utilizing Sub-vendors that are not billed on an hourly basis and are governed by a Statement of Work (SOW) document.) Each project will be one million dollars (\$1,000,000.00) or less and include tasks such as analysis; planning; design; development; upgrades; one-time maintenance; installation; integration; and knowledge transfer. It is open to all State Agencies, local governments, and certain non-profit organizations.

This Contract Projects-Based or Deliverables Staffing shall not be used to procure:

- i. Staff augmentation services
- ii. Hardware, including appliances
- iii. Commercial Off-the-Shelf (COTS) packages
- iv. Software licenses without accompanying services
- v. Software maintenance fees, except for purchase with initial software licenses
- vi. Ongoing Services, such as ongoing maintenance, system administration, hosting services, ongoing network monitoring, or production operation services
- vii. Standardized Training Courses
- viii. Services available through other State of Tennessee Statewide Contracts
- ix. Audit Services
- x. Legal Services

The services must be provided in accordance with the Tennessee Information Resources Architecture. State of Tennessee standard products are represented in the Specializations for the Technical Categories. The procuring State agency will identify the State of Tennessee standard products available for use in an IT project in the SOW.

CPO Contract Administrator:

Andrew Martin
Category Specialist
Central Procurement Office
(615) 532-7367
Andrew.Martin@tn.gov

STS Contact:

Chris Benson
Business Operations Director
Strategic Technology Solutions
(615) 770-1126
Chris.Benson@tn.gov

Supplier Contact Information:

Uwork.com, Inc. DBA Covendis Technologies
Edison Contract: 73706

Covendis Program Management Team

Melissa Honabach, VP, Program Management, melissa.honabach@covendis.com , 404-316-2003
Barbee Taylor, VP, Client Operations, barbee.taylor@covendis.com , 404-271-3245
Sarah Loftus, Program Manager, sarah.loftus@covendis.com , w:770.903.9990 x4204 c:678.200.6903
Lea Ann Baker, Program Manager, leaann.baker@covendis.com , 303-809-0545
Carmen Bradley, Program Manager, carmen.bradley@covendis.com , 248-914-4493
Ashley Lemos, Program Manager, Ashley.lemos@covendis.com
Greg Taylor, Program Manager, greg.taylor@covenids.com , 404-936-0262

Covendis Account Services Team

customercare@covendis.com
866-COVENDIS (866-268-3634)

VMS Portal for State Use:

<https://state-of-tennessee.covendis.com/>

Usage Instructions

Requests by State Agencies for Projects-Based/Deliverables Staffing in the information technology field require approval by STS prior to finalizing the award of any project.

1. The requesting agency will create an initial Project Request draft of the objectives, requirements, costs, etc. related to the project. The Covendis program manager will provide assistance and direction to the agency. For any IT project, the agency will enter it into Planview, the State's Project and Portfolio Management software, using the Work Type "Project". The Solution Review Board (SRB) will review and provide Project Request approval. No IT project will be solicited under this contract that does not have SRB approval. More information about accessing Planview and the SRB process can be found at:

Overview and General Information:

<https://www.teamtn.gov/sts/planning-services/information-systems-planning.html> and
<https://www.teamtn.gov/sts/planning-services/planview.html>

Add A New Project In Planview:

<https://www.teamtn.gov/content/dam/teamtn/sts/sts-planning-docs-beginning-march-15-2019/2022-updates/05-Add%20New%20Project%20-%20QRG.pdf>

During this time, the procuring agency will create a Statement of Work (SOW) – completing the required fields – for the vendors to fill out. See Appendix A for the SOW template. Note that the Project Request and the scope of the SOW must be consistent. The Scope of the SOW should be for the complete Project Request. **If the agency would like to include evaluation criteria beyond cost, the procuring agency must obtain CPO approval prior to issuing the SOW request. Please see Pro Forma Section A.11.i.i.1.**

2. The agency user will submit the final SOW draft to the Covendis program manager. In the SOW the agency will indicate response requirements and evaluation criteria to be used during the evaluation of the responses received from sub-vendors. The criteria can use qualitative and quantitative evaluation factors during the evaluation of the Project Quotes.
3. Covendis shall create a requisition based on the information in the SOW, including description, schedule, and phases/milestones. The SOW will be attached and distributed to the subvendors. Covendis shall setup VMS account access and provide VMS training to the agency to complete **Step 13**.
4. Covendis shall facilitate questions and answer sessions and written question responses between sub-vendors and the agency as needed before the submission deadline.

5. Sub-vendors will submit their project proposals via the Covendis VMS.
6. Covendis shall pre-screen proposals to ensure compliance with the terms of SWC 387.
7. Covendis shall present a minimum of 3 compliant project proposals or written justification that the subvendor network is unable to deliver 3 project quotes. Please see Proforma contract section A.11.g. Covendis shall ensure that sub-vendors are compliant members of the network. Covendis shall provide the evaluation rubric to the agency as a suggested resource along with proposals.
8. Proposals shall include at minimum:
 - a. A high-level overview of how the sub-vendor meets the SOW requirements and is able to provide the services requested in the SOW.
 - b. A project work plan that accomplishes the project within the specified timeframe, detailing all tasks to be performed. This work plan shall include a complete sub-vendor staffing and onboarding plan, providing a narrative description of the proposed project team, showing sub-vendor personnel certifications, its members, and organizational structure, along with an organizational chart identifying the key job descriptions, escalation process/path regarding service issues, who will be assigned to deliver the goods or services required by the SOW. Include details outlining the specific duties that will be performed by each proposed job description and how they will function over the course of the SOW.
 - c. A firm, fixed total price that covers **all** costs, including, but not limited to, manpower, administrative fees, and travel, to accomplish the project. This total price shall be the maximum amount of compensation that can be paid under this SOW; regardless of the resources required, Covendis (on behalf of the sub-vendor) may charge the procuring agency no more than this total price to complete the project. Covendis shall ensure all proposing sub-vendors maintain the same understanding of total price to include the 0.75% MSP Fee. The total price and associated cost item(s) must meet the following:
 - i. The cost item(s) submitted must correspond exactly to the cost item(s) format included in the SOW.
 - ii. Costs must be entered costs for **all** requested cost item(s). A zero may entered in a cost item if the sub-vendor does not intend to charge the agency for the item.
 - iii. Please see Proforma Section C.4. regarding travel compensation. The total price must be **less than** the SOW Monetary Cap.

9. The agency will use the predetermined evaluation criteria and evaluate the responses received. The criteria can use qualitative and quantitative evaluation factors during the evaluation of the Project Quotes. When considering qualitative evaluation factors, no less than 3 evaluators who are State Employees are used.
10. The procuring agency will need to obtain a signed STS Endorsement for the top scoring proposal as a response to the SOW. The STS Endorsement Form and process can be found at: <https://www.teamtn.gov/sts/planning-services/information-systems-planning/endorsement-request.html>

Please note: This step could require changes to be made. As a result of the STS endorsement any recommended changes, revisions and/or added language shall be incorporated into the SOW by the requesting agency before re-submitting for CPO review.

11. CPO will review for compliance with terms of the contract and procurement process and will issue final approval to the agency to award the project.
12. Once the agency has received CPO approval for the final award, the agency will accept the proposal in the Covendis VMS, which will notify the respondents of who is being awarded the project.
13. Covendis shall submit the Task Order for the sub-vendor to sign. Once the sub-vendor signs and returns to Covendis, Covendis shall sign and send the completed Task Order to the agency. The agency will then complete the requisition and Purchase Order process into Edison. Once the Purchase Order is approved, it will be dispatched to the Covendis (emailed to tennessee@covendis.com).
14. State Requisition and Purchase Order Generation For information on how to create a requisition and/or purchase order please reference our CPO Job Aids on the following page: <https://www.teamtn.gov/cpo/learning-development/cpo-job-aids.html>
 - Email CPO's Content Group a request to establish Item IDs so that the Requisition and Purchase Order can be entered into Edison. Be sure to associate the purchase with the correct Edison Contract Number (found in the Contact Info of this document). Be sure to attach the Task Order signed by both parties to the Purchase Order.

NOTES: When entering the Purchase Order in Edison, select the PO type as a One-Time Purchase (DOT) instead of a Contract Release Order (CRO). This will ensure that Edison automates the appropriate workflow for approval as required by the contract.

Billing and Payment Instructions

The services shall be provided and invoiced as described in the SOW. The invoiced amount shall not to exceed the Task Order Project Price stated in the Task Order. The payment method to be used in any case shall be described in the SOW and shall always be for completed deliverables.

A final payment shall be paid upon completion and final approval of the End User. The final payment shall not be less than thirty (30%) percent of the total fixed price.

Local Government Usage Instructions

This contract is available to all local governments and State universities in the State of Tennessee, and any nonprofit which is exempted from taxation under 26 U.S.C. Section 501(c)(3) as amended and which contracts with the Department of Mental Health and Substance Abuse Services or Department of Intellectual & Developmental Disabilities to provide services to the public (T.C.A. 33-2-401). Tennessee. These non-State agency Authorized Users are encouraged, but not required, to use a process similar to the one outlined for state agencies, replacing the State-only applicable approvals and endorsements with their own. They will process POs and payments in accordance with their own internal rules and procedures.

System Training and Support

Covendis provides multiple channels for user support, including a toll-free help desk phone number, online issue reporting system via email, documentation, training, a comprehensive online knowledge database, and community forums.

Users can contact the Covendis help desk by emailing tennessee@covendis.com or by dialing our toll-free support number, 1-877-COVENDIS (268-3634), which is available between 7 AM and 7 PM CDT, Monday through Friday, though certain **team members are often available beyond designated hours for mission-critical or time-sensitive** issues.