



Upper Occoquan Service Authority

Leader in Water Reclamation and Reuse

14631 COMPTON ROAD, CENTREVILLE, VIRGINIA 20121-2506
(703) 830-2200

TO ALL RFP RECIPIENTS:

For UOSA RFP 26-10 Digital Transformation

SUBJECT: Addendum # 4

The above numbered solicitation is amended as set forth below. The hour and date specified for receipt of offers:

is not extended

is extended

OFFERORS MUST ACKNOWLEDGE receipt of this Addendum by one of the following methods:

- a. By acknowledgement of this Addendum on Submission Form submitted with the proposal;
- b. By referencing its receipt in your Transmittal Letter

If by virtue of this Addendum you desire to change a proposal already submitted, such change may be made by letter, provided it includes reference to the solicitation and this Addendum and is received prior to the due hour and date specified.

DESCRIPTION OF ADDENDUM:

The following attachments to this addendum shall be made part of UOSA RFP 26-10:

1. Attachment A - This attachment includes answers to all questions received before the deadline for questions.
2. Attachment B - Includes modifications to RFP language.
3. Attachment C - Includes a cost summary sheet that shall be included in Offerer's cost proposal submissions.

All other Terms, Conditions, Tables, Charts and Specifications, and Drawings not otherwise changed remain as originally stated or as shown.

ISSUED BY:

Upper Occoquan Service Authority

 4/14/2026

Dustin Baker, Purchasing Manager Date

UOSA RFP 26-10 - Addendum #4 - Attachment A
Questions & Answers

#	Question	Answer
1	<p>Because there isn't a capital design or construction project as part of the Digital Transformation Products and Services, RFP 26-10, we assume that the text shown below as part of 3.5 Proposal Organization / A. Technical Proposal (Volume I) is an artifact from a previous RFP, so it doesn't apply. Please confirm.</p> <p>"3. Confirmation of Compliance with the Specification(s): The Offeror shall describe how the proposal meets UOSA's Specification. If any portion of the specification cannot be met, the Offeror must identify the discrepancy in detail and describe an alternative solution."</p> <p>If it is not an artifact, where is the list of Specifications?</p>	<p>Section 3.5.A.3 text shall be modified as outlined in Attachment B.</p>
2	<p>In 3.5 Proposal Organization / B. Cost Proposal (Volume II), you request the hourly rates for the team members shown in the Technical Proposal. Will you provide the specific position/title categories that you want included?</p>	<p>Please see Cost Summary Worksheet, Attachment C to this addendum.</p>
3	<p>Will the two Foundational Initiatives (A and B) be awarded as separate contracts with separate task orders, or will a single vendor be expected to perform both? Will UOSA consider awarding each to a different firm?</p>	<p>They will be separate task orders performed in parallel. UOSA foresees these initiatives being performed by different vendors, but we reserve the right to award both initiatives to one vendor.</p>
4	<p>For the Digital Maturity Assessment (Initiative B), does UOSA expect the selected firm to have direct hands-on experience with each platform listed in Section 2.4 (e.g., AVEVA PI, Clinisys LIMS, eLogger, Esri ArcGIS), or is familiarity with equivalent platforms in similar utility environments acceptable?</p>	<p>Section 2.4 was included to give firms more insight into UOSA's "current state". UOSA does not expect firms to have experience with the platforms listed in 2.4; equivalent platforms would be acceptable, though direct experience would be a benefit if it is determined that UOSA should continue using these platforms long-term.</p>
5	<p>What is the anticipated level of effort (number of hours or full-time equivalent weeks) UOSA envisions for each of the two Foundational Initiatives? Is there a target completion date for Initiative B deliverables given the initial contract period ends June 30, 2026?</p>	<p>UOSA estimates that each foundational initiative would take between 2- 6 months; a specific number of hours has not been estimated. The purchase orders that would be used to fund these initiatives are not tied to contract periods or fiscal years. It is possible for the two foundational initiatives or future initiatives to span multiple contract periods.</p>
6	<p>For the Digital Transformation Objectives (Section 2.3), will task orders be issued only after completion of the Foundational Initiatives, or can UOSA issue task orders concurrently if a specific need is already well-defined (e.g., Power BI dashboard development)?</p>	<p>UOSA could issue task orders concurrently if a specific need is well-defined and does not conflict with the foundational initiatives.</p>

7	Does UOSA anticipate issuing the Digital Transformation Objective task orders to firms that participated in the foundational work (preferred continuity), or will they be issued to any qualified contract holder regardless of which foundational initiative they performed?	Any qualified contract holder could be issued a task order.
8	What percentage of work is expected to be performed on-site at UOSA's Centreville, VA facility versus remotely? Is there a minimum on-site presence required per week or per month for any initiative or objective?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
9	For Objective A (Visualization Tools), does UOSA have an existing Power BI Premium or Pro licensing infrastructure, or will licensing acquisition be part of the scope? Will the selected firm be expected to manage or advise on Microsoft licensing?	UOSA owns 6 PowerBI Premium licenses. The selected firm will be expected to advise on Microsoft licensing.
10	For Objective B (Process Digitization), does UOSA already have Microsoft Power Automate licensing in place? Is Adobe Acrobat Sign or another e-signature tool under consideration, or is this part of the selection the vendor will recommend?	UOSA has Microsoft 365 licensing in place including certain licenses for Power Automate. We are currently using DocuSign on a small scale for the Lab, but we do not have organization-wide capability or governance for digital transaction management. Selection and implementation of an e-sign solution should be included in vendor scope.
11	For Objective D (Predictive Process Control), does UOSA expect vendor consultants to have AVEVA PI System and System Platform development experience, or is the scope more focused on prescribing an architecture and selecting tools that could be implemented by UOSA's internal OT team?	If it is determined that PI and System Platform development should be done as part of an initiative, then consultants should have experience with them. If development in other software platforms is recommended, then vendors should have experience with those other platforms.
12	Is data integration between OT systems (SCADA/AVEVA PI) and IT systems (Power BI, JD Edwards, LIMS) within scope for this RFP, or is that connectivity assumed to already exist through UOSA's internal ITS team?	Certain connectivity exists and is managed by ITS; however, UOSA is not married our current data integration architecture. We are open to new methods of data integration. Guidance on data integration methods is within the scope for this RFP.
13	Can UOSA provide an estimated budget range or not-to-exceed amount for either Foundational Initiative, or for the overall program? This will help Offerors structure appropriate staffing levels and not under- or over-scope proposals.	UOSA does not have an expected budget range for either initiative; we have not completed initiatives like this in the past.
14	Given that this is a multi-award contract vehicle, will UOSA disclose how many contract slots are available for each foundational initiative and for the objectives collectively?	We do not have a set amount of awards in mind for any of the foundational initiatives or follow on objectives. The awards in each category will be dependent on the proposals received and how they rank in the evaluation process.

15	Remote/Offshore Work: Does UOSA permit any portion of the work to be performed remotely or through offshore resources, or is a consistent on-site presence at the Centreville facility required for all project phases?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
16	Incumbency: Is this a new initiative, or is there a current contractor performing these or similar services?	This is a new initiative.
17	Budgetary Scope: Is there an estimated budget or "not-to-exceed" amount allocated for the initial contract period through June 2026?	We do not have a specific budget amount that would cover all elements of the resulting contracts.
18	Submission Format: For physical submissions, should the electronic copies of the Technical and Cost volumes be provided on separate USB drives to ensure price information is not commingled with technical data, as per Section 3.7.C?	The technical and cost volumes may be provided on one USB drive provided they are separate files.
19	Pricing Details: Should the hourly rates in Volume II be fully burdened? Additionally, are there specific templates preferred for listing separate line items such as travel and mileage?	Yes, the rates should be fully burdened.
20	Key Personnel: Does UOSA require resumes for every staff member involved in the project, or only for designated "Key Personnel" leading the foundational initiatives?	Resumes should be included for key personnel as well as staff members who will be supporting any technical component of an initiative.
21	System Access: For the Digital Maturity Assessment, what level of access will be granted to the existing software platforms mentioned in Section 2.4 for the purpose of identifying gaps and integration opportunities?	Contractors will be able to shadow UOSA's systems administrators of the various platforms to gain as much information about architecture/configuration/licensing/etc. in order to identify gaps and integration opportunities.
22	Will UOSA assign an internal executive sponsor and cross-functional team to support the foundational initiatives.	Yes; there will be UOSA personnel assigned to both of those roles.
23	With respect to Section 2.3 Digital Transformation Objectives, is the scope of work limited to assessment, recommendations, and roadmap development, or does UOSA anticipate that awarded contractors will also be responsible for hands-on implementation of the identified initiatives?	The scope is not limited solely to assessment and recommendations. If future initiatives are identified and UOSA is not able to complete the work internally, awarded contractors will be responsible for hands-on implementation.

24	Section 2.7 notes work will occur during standard office hours. For foundational initiatives, does UOSA anticipate primarily on-site delivery, or is a hybrid remote/on-site model acceptable?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
25	Section 2.2.A references COBIT and ISO/IEC 38500. Has UOSA previously implemented elements of a governance framework, or should the selected vendor assume responsibility for developing the governance charter, committee structure, intake/prioritization model, and associated policies from inception?	UOSA has not previously implemented elements of a governance framework but is aware that these frameworks and standards exist. The selected vendor will assist UOSA with the development of the governance charter, committee structure, intake/prioritization model, and associated policies.
26	Does UOSA currently maintain documented procurement, lifecycle management, capital planning, or IT project portfolio processes that the governance framework must integrate with, or is the expectation that these processes be established as part of this initiative?	The referenced processes must integrate with the governance framework. If it is identified that existing processes need to be altered in order to accomplish the integration with a governance framework, then UOSA will alter its processes to do so.
27	Should the governance framework address both IT and OT (Operational Technology / SCADA) environments equally, and is formal cybersecurity oversight (NIST 800.53 / 800.82 alignment) expected to be incorporated into governance deliverables?	The governance framework will address all environments and networks whose hardware, software, and infrastructure is supported by the Integrated Technology Services (ITS) group: IT, OT, Security, VoIP, HVAC, etc.
28	Section 2.2.B references inventorying IT and OT systems. Will UOSA provide an existing system inventory, enterprise architecture diagram, or asset documentation, or should the vendor assume full discovery and documentation development as part of the assessment?	UOSA will be able to provide inventory and architecture/network diagrams, though additional discovery may need to be performed by a vendor in specific circumstances.
29	What level of technical depth is expected in the maturity assessment (high-level capability benchmark vs. detailed architectural and cybersecurity posture evaluation), and does UOSA prefer a specific maturity model?	UOSA expects a detailed evaluation, though the focus should be on incorporating new platforms or integrating existing platforms to fit into UOSA's overall network architecture and cybersecurity posture (both of which already align with industry best practices). UOSA does not have a preference on a specific maturity model that is chosen by the vendor.
30	How many divisions and personnel should vendors anticipate engaging for workshops and interviews as part of the Digital Maturity Assessment?	Personnel from all divisions/departments will be involved with this process, estimated 6 - 12 personnel in formal workshops/interviews.
31	For the multi-year roadmap deliverable, what time horizon is preferred (e.g., 3-year, 5-year), and should the roadmap include capital investment estimates, funding ranges, staffing impacts, organizational restructuring recommendations, and sequencing dependencies?	A 5-year roadmap is requested with short, medium, and long term initiatives identified. The roadmap should include budgetary considerations, funding ranges, staffing impacts, organizational restructuring recommendations, and sequencing dependencies.

32	Section 2.3.A references integration across SCADA, LIMS, CMMS, and logbooks. Does UOSA currently operate a centralized data warehouse or integration layer, or are dashboards built directly against source systems?	UOSA does not operate a centralized data warehouse or integration layer; all dashboards are currently built against individual source systems. UOSA is looking for recommendations/assistance to improve our existing data architecture.
33	UOSA lists Microsoft Power BI and Microsoft 365 tools among current platforms. Is Microsoft the intended enterprise standard for analytics and workflow automation, or is the vendor permitted to propose enhanced architecture approaches (e.g., centralized data platform, lakehouse, alternative BPM solutions) to support scalability and cross-system integration?	Power BI and MS 365 are preferred due to existing user adoption and licensing; however, UOSA is open to other approaches that integrate with our existing systems depending on cost.
34	Section 2.3.D references predictive analytics, digital twins, and proactive optimization. Has UOSA previously implemented predictive modeling within AVEVA PI or other systems, or would these capabilities require foundational data modernization and data quality remediation (e.g., structured maintenance history in JD Edwards)?	UOSA has not previously implemented predictive modeling and requires foundational data modernization and data quality remediation.
35	For digital twin and predictive initiatives, would UOSA consider phased or pilot-based implementation (e.g., single process or asset class) prior to enterprise rollout?	UOSA would consider either approach based on vendor recommendation.
36	Section 2.3.B and 2.3.E reference process digitization and document management modernization. Are there specific high-priority workflows already identified?	Certain documentation and workflows have been identified, but considering that this objective affects all departments and divisions, further interviews/workshops will need to be completed with UOSA personnel to identify and prioritize all workflows and documentation slated for modernization/digitization.
37	The RFP does not specify a budget range. Has UOSA established not-to-exceed budgets for the Governance and Digital Maturity initiatives?	UOSA does not have an expected budget range for either initiative; we have not completed initiatives like this in the past.
38	Is there an anticipated annual or multi-year funding target for digital transformation initiatives beyond the foundational phase, and should vendors include phased pricing scenarios aligned to funding tiers?	Specific funding targets have not been identified yet and will be based on impact/ROI of future initiatives as determined by the governance committee and digital maturity assessment/roadmap.
39	Section 3.18 indicates Task Orders for foundational initiatives will be issued immediately upon contract award. Is there an anticipated start date and target completion timeline for Governance and Digital Maturity initiatives?	We anticipate starting the initiatives in late Spring or early Summer and foresee the initiatives taking between 2 - 6 months depending on scope.

40	Are there internal fiscal year, budget cycle (e.g., July 1), or Board milestones that require roadmap completion by a specific date?	Yes, to assist with UOSA's budget planning, we prefer that the foundational initiatives be completed by 12/31/2026.
41	Section 3.3 Addenda to the RFP: Please confirm the below RFP statement is a typo and addenda receipt is to be provided in Attachment B not Attachment D. Acknowledge your receipt and compliance with the Addenda by noting it in the space provided on the Transmittal Form (Attachment "D"). Failure to acknowledge receipt of an Addendum may result in rejection of the proposal.	Confirmed. Addenda should be acknowledged on Attachment B - Solicitation Response Form. All references to "Attachment D" in Section 3.3 shall be removed and replaced with "Attachment B".
42	Section 2.3 Digital Transformation Objectives: Please clarify if the objectives in Section 2.3 are to be considered as the north star goals when providing the solution for the two foundational initiatives in Section 2.2? Please confirm that the scope does NOT include tasks to implement objectives such as configuring, deploying and/or integrating software tools or solutions.	Correct, the objectives in 2.3 are north star goals for the foundational initiatives. The foundational initiatives do not include tasks to implement the objectives in 2.3.
43	Section 1.3 Period of Contract: The contract specifies that the initial contract period will be from date of aware until ends June 30, 2026. Does the scope of services need to be completed by this date and considered a hard deadline?	No. Initiatives can span multiple fiscal years.
44	Attachment A - Terms and Conditions; Section 3.16 Warranty states: "Any implied warranties, including but not limited to the warranty for "Merchantability and Fitness for A Particular Purpose" are not waived and are a mandatory part of this solicitation and any ensuing Contract". Please clarify if the identified language applies to consulting services as described in the RFP and/or provide confirmation that Proposers will NOT be penalized or considered non-responsive for taking exception to this language. We do not warrant our consulting services for merchantability and we do not warrant that the consulting services will be fit for a particular purpose.	In general we would like our terms and conditions to be accepted fully. We understand that that may not be possible in all circumstances and we may entertain reasonable, limited exceptions depending on service. UOSA still reserves the right to declare proposals submitted with exceptions non-responsive.
45	Are RFP submitters allowed to respond to individual elements of the RFP or must all elements be submitted?	Offerors may respond to individual RFP elements and still be considered for award.

46	In section 3.1 and 3.5 the language suggests bidders must respond to all proposal elements or risk disqualification. However, in Attachment D - Qualified Service Categories - the RFP communicates the opportunity to elect only the initiatives/objectives that we'd like to pursue. We would like to clarify what appears to be a contradiction.	The language in 3.1 & 3.5 is intended to mean that proposals must include all requested elements, i.e., all required forms, etc. Offerors do not need to be capable of performing every initiative/objective in order to be considered for award for a particular service category.
47	What is the expected mix of on-site vs. remote work in delivering the services described in the RFP?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
48	Does UOSA permit the use of offshore personnel in the delivery of services under this contract? If so, are there specific roles, data access restrictions, or notification requirements that would apply?	UOSA permits the use of offshore personnel. We do not currently have any policies which differentiate between onshore and offshore resources regarding roles, data access restrictions, or notification requirements.
49	For the cost proposal (3.5(b)) – Will UOSA provide a cost proposal template or prescribed format, or is the proposer expected to develop their own format consistent with the requirements described?	See the template provided as attachment to this addendum.
50	Section 3.5(b) requires that related costs such as travel, mileage, housing, and food be included as separate line items. Given that the cost proposal calls for hourly rates rather than a total project cost, should these related costs also be expressed on an hourly basis, or should they be presented as estimated amounts, actuals billed separately, or in some other format?	Cost proposals should include fixed totals amounts for foundational initiatives. Costs for travel and other expenses shall be included in these totals. Travel and other expenses for future Digital Transformation Objects work shall be billed at actual amounts. When quotes are requested for future work way may request travel amounts be included in those quotes. - Final
51	Page 3: Is UOSA expecting firms to provide strategic advisory services only, or full lifecycle implementation including system configuration and development?	We're not expecting firms to provide system configuration and development as part of the foundational initiatives, but we are expecting that for future initiatives.
52	Page 3: Please confirm that vendors may submit proposals exclusively for a single objective (e.g., Visualization Tools) without bidding for foundational initiatives.	Confirmed.
53	Page 4: Will foundational initiatives be awarded only to firms demonstrating prior governance and digital maturity experience within utility or wastewater environments?	Experience with other utilities and wastewater environments is desirable and would be reflected in the evaluation, however, it is not a requirement.
54	Page 5: Has UOSA conducted any prior digital transformation or IT maturity assessments that can be shared as reference inputs?	No prior assessments have been performed.

55	Page 5: Is a comprehensive IT/OT system inventory currently available? If so, can approximate system counts or integration diagrams be shared?	Asset inventories and integration diagrams cannot be shared. Regarding system counts, there are several hundred assets in each of the IT and OT environments. Regarding integration diagrams, UOSA's IT and OT network architecture is similar to a traditional Purdue model with a next-gen firewall segregating the IT and OT environments with a DMZ network in between.
56	Page 6: What are the estimated data volumes (e.g., SCADA tag count, PI data retention size, LIMS daily transactions) to assess integration complexity?	We estimate the following: 10,000 SCADA tags, 5,000 PI tags (some spanning 20+ years of historical data), and 3,000 LIMS daily transactions.
57	Page 6: Are key KPIs already defined for the shift-turnover dashboard, or is KPI identification part of the consultant's scope?	KPI identification would be part of the consultant's scope including facilitating workshops with UOSA personnel.
58	Page 6: Approximately how many business processes are currently paper-based and targeted for digitization under this initiative?	In general, all processes, whether paper-based or digital, are in scope for improvement. Identification and prioritization will be determined through workshops with UOSA personnel and the future IT governance committee.
59	Page 6: Has UOSA previously implemented predictive analytics, machine learning models, or digital twin initiatives?	No.
60	Page 6–7: Are standard APIs or data integration mechanisms available across these platforms to support analytics and dashboard integration?	Not currently.
61	Page 7: What is the current Power BI licensing model (Pro/Premium), and approximate number of business users?	UOSA has six licenses of Power BI premium used for development. There are approximately ten additional installs of the free version for viewing capabilities.
62	Page 8: Is formal cybersecurity compliance assessment expected as part of scope, or only adherence to standards during solution design?	No assessment is expected, only adherence to standards.
63	Page 8: Please clarify whether Public Sector experience is mandatory for foundational initiatives or only a preferred qualification.	Experience with other public sector, utilities and/or wastewater environments is desirable, but it is not a requirement.
64	Page 10: Will evaluation of price consider blended rate per initiative, or is price evaluated strictly on lowest hourly rate?	Cost will be evaluated based on fixed project cost for the two foundational initiative (Section 2.2) awards. Costs will be evaluated based on average hourly rates for the awards for Section 2.3 objectives.
65	Page 14: Can UOSA provide an estimated annual budget range or expected effort hours per year for planning and resource alignment purposes?	UOSA does not currently have a target budget range for initiatives to address the 2.3 objectives. Determining budget and resource needs will be part of the roadmap initiative.

66	Regarding the work location, we would like to clarify the expected ratio of onsite versus remote work. While UOSA provides office accommodations and requires travel expenses to be listed separately, is it acceptable for certain technical and functional tasks, such as software configuration, custom programming, and dashboard development, to be performed remotely via secure access?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
67	Does UOSA anticipate awarding both foundational initiatives to the same firm, or is UOSA seeking different firms for each initiative?	They will be separate task orders performed in parallel. UOSA foresees these initiatives being performed by different vendors, but we reserve the right to award both initiatives to one vendor.
68	If multiple firms are awarded for the foundational initiatives how does UOSA envision coordinating overlapping elements between the two scopes?	The two scopes are largely unrelated. They will converge only when (1) the governance committee is stood up and (2) when future digital transformation initiatives are identified and need to be prioritized. There will be a singular UOSA resource who will coordinate between both foundational initiatives at that point.
69	For foundational initiatives will task orders be fixed-fee or time & materials based on hourly rates?	The task orders for the foundational initiatives will be based on the scope and fixed price proposed.
70	What is the anticipated contract value of the work associated with this RFP?	UOSA does not currently have a target budget range for initiatives to address the 2.3 objectives. Determining budget and resource needs will be part of the roadmap initiative.
71	Are we required to do setup and configuration tasks across the systems listed or can we respond with advisory skills and experience related to these applications and desired objectives?	If UOSA has the technical capabilities and the resources to execute the setup and configuration, then guidance from a consultant would be sufficient. If not, then the setup and configuration tasks will be part of the consultant's scope.
72	For tasks related to digital transformation objectives, will task orders be competed among all awardees who selected the category in Attachment D, or may some work be direct-awarded?	After the foundational initiatives are completed and future initiatives are defined and prioritized, UOSA will request SOWs from the multi-vendor pool for each new initiative. The task orders will be competed among the pool members.
73	Given UOSA's intent to award multiple contracts to vendors with overlapping support areas, how will UOSA coordinate responsibilities to prevent duplication or overlap?	UOSA intends to award multiple contracts to vendors with overlapping support areas (qualified service categories from Attachment D); however, this does not imply that task orders will be issued to different vendors for overlapping support areas. In a situation where future task orders have scope that potentially overlaps, the newly-formed governance committee (from the foundational initiative) will help to resolve these issues. Additionally, there will be UOSA personnel acting as digital transformation champions who will help to resolve any conflicts that arise from a potential overlap of scope between task orders.

74	Will UOSA provide any minimum guarantee of work or funding for awarded vendors under this IDIQ-style structure?	Awards for Section 2.3 objectives will not guarantee any minimum amount of work.
75	Does UOSA prefer vendors to use COBIT, ISO/IEC 38500, or another framework as the basis for building the Technology Governance Program?	UOSA has no preference; those frameworks were listed as examples of potential frameworks that could be used. We are looking for help choosing a framework that fits our organizational needs.
76	Should the Digital Maturity Assessment include both IT and OT environments (e.g., SCADA, controls, instrumentation)?	The maturity assessment should include both environments; however, we are not looking for help with controls and instrumentation.
77	Can UOSA provide more detailed information on current platforms (Section 2.4), including versions, modules, hosting environments, integrations, and interface inventories?	We cannot provide that at this time. A detailed discovery will be performed as part of the maturity assessment and roadmap initiative.
78	What is the preferred planning horizon for the multi-year roadmap (e.g., 3, 5, or 7 years), and should it include ROM cost estimates and staffing projections?	We envisioned a 5-year horizon when we wrote the RFP, and ROM cost estimates and staffing projections would be desirable.
79	For visualization enhancements (Section 2.3.A), which initial dashboards or workflows (e.g., shift-turnover dashboards) are highest priority for UOSA?	This will be determined during the maturity assessment and roadmap initiative to ensure UOSA personnel from the different divisions are on the same page.
80	Given UOSA's use of Power BI, Power Automate, Teams, and SharePoint, does UOSA have an existing M365 governance model, and should vendors provide recommendations to expand or redesign it?	UOSA does not have an existing M365 governance model. We are open to vendor recommendations on redesign/expansion.
81	Which business processes (e.g., maintenance, safety, procurement, HR) does UOSA identify as highest priority for digitization under Section 2.3.B?	This will be determined during the maturity assessment and roadmap initiative to ensure UOSA personnel from the different divisions are on the same page.
82	Will UOSA evaluate and award across categories as a single overall best-value determination, or will UOSA make separate best-value determinations per category checked on Attachment D (initiatives/objectives)?	UOSA will make separate best-value determinations per category checked on Attachment D.
83	The RFP states the initial period is "from date of award until 6/30/2026," but the fixed-rate clause refers to an "initial 12-month contract period" for firm hourly rates. Please clarify what UOSA considers the initial contract year for purposes of fixed rates and CPI-U adjustments (calendar year, fiscal year, or 12 months from award).	RFP Section 1.3 language has been modified to make the initial contract period 1 year and in alignment with the cost increase language. See addendum Attachment B.
84	UOSA states task orders for the foundational initiatives will be issued "immediately upon contract award." Does UOSA have an anticipated award date or planned start-window for these immediate task orders?	We anticipate starting the foundational initiatives in late Spring or early Summer and foresee them taking between 2 - 6 months depending on scope. We prefer that both foundational initiatives be completed by 12/31/2026.

85	Please describe the current-state governance baseline: What governance bodies, charters, or decision forums exist today (if any), and what pain points triggered the need for this initiative (e.g., intake chaos, procurement delays, unclear ownership)?	There are no governance bodies or charters for IT or OT technology decisions. One of the few existing decision forums is our reserve maintenance budgeting process, but that only impacts a small subset of technology decisions. The pain points can be reverse-engineered by looking at the list of objectives in section 2.2.A.
86	For the Technology Governance Committee, what decision authority will it have (advisory vs approving), and how will it interface with existing senior leadership approvals and procurement authority?	The committee will have approval authority, but it will integrate with the existing budget and procurement processes.
87	Does UOSA expect the vendor to deliver tooling enablement (configuration of an intake/portfolio tool, KPI dashboards, reporting workflows), or only policy/process artifacts (charter, RACI, templates, procedures)?	After the foundational initiatives are complete, UOSA expects the vendor to deliver tooling enablement.
88	When the RFP calls for identifying cybersecurity risks and references NIST 800-53/800-82 "where applicable," does UOSA want (a) a qualitative risk inventory, (b) a control-mapped gap analysis, or (c) technical validation/testing?	A qualitative risk inventory is sufficient.
89	What is the expected stakeholder engagement footprint (approx. number of workshops/interviews, divisions involved, and availability of SMEs)? Will UOSA provide a stakeholder roster and scheduling support?	This depends on the initiative. UOSA will provide stakeholder roster and scheduling support.
90	Does UOSA have an existing strategic plan/capital plan/asset management strategy that should be treated as the authoritative "organizational goals" baseline for the target-state vision?	UOSA has a capital plan, but we do not have an IT strategic plan or SCADA Master plan. The asset management strategy is currently being reworked but has not been completed.
91	What OT/IT data access constraints apply to integrating SCADA/PI/LIMS/CMMS/eLogger data (e.g., network segmentation, read-only requirements, mandated integration patterns, restrictions on direct connectivity to OT)?	Data access constraints should follow NIST SP 800-82. UOSA's IT and OT network architecture is similar to a traditional Purdue model with a next-gen firewall segregating the IT and OT environments with a DMZ network in between.
92	Are visualization tools expected to support 24/7 operational availability, and are there minimum expectations for data refresh latency (near-real-time vs scheduled refresh)?	We would like the creation of visualization tools which support 24/7 operational availability. Regarding data refresh latency, it will need to be determined during workshops with UOSA personnel.
93	Does UOSA anticipate the need for custom development (APIs, scripts, automated routines) to enable integration and dashboards, or should solutions primarily use native connectors/configuration?	Either solution will be considered, but native connectors are preferred. That said, many disparate platforms do not have native connectors, so custom development will likely be needed.

94	Does UOSA already have an approved electronic signature capability and governance for digital transaction management, or should vendor scope include selection/implementation of an e-sign solution?	UOSA currently using DocuSign on a small scale for the Lab, but we do not have organization-wide capability or governance for digital transaction management. Selection and implementation of an e-sign solution should be included in vendor scope.
95	The scope references equipping field staff with hardware. Should vendors assume UOSA will procure/manage devices and MDM, or should vendor scope include device selection/configuration and operational rollout support?	Vendor scope should include device selection/configuration and operational rollout support.
96	The objective emphasizes mobile-friendly collaboration. What is UOSA's current mobile device policy for operations/field staff (corporate vs BYOD), and what constraints exist for using collaboration tools in plant environments?	Mobile device governance and policies are complicated at UOSA. Most staff use their personal phones, though a handful of staff have UOSA-provided phones that are managed by the Finance division. UOSA is in the process of developing internal communications standards and would be looking for guidance on how best to implement collaboration tools as well as how to structure the governance of mobile device management through the IT group.
97	What is the expected data readiness baseline for predictive work (historical retention, completeness, sensor coverage), particularly in PI/SCADA, LIMS, CMMS, and related operational datasets?	UOSA does not have any baselines defined; this would be determined through workshops with UOSA personnel.
98	The RFP references "digital twins." Please clarify the intended meaning: process simulation twins for treatment optimization, asset-level twins for condition monitoring, or both—and which decisions the twin must support (training, scenario testing, optimization, maintenance forecasting).	Both meanings should be considered as well as all the decisions they can help support. The foundational initiatives will help to define goals and priorities of any digital twin solution.
99	What are UOSA's authoritative records retention schedules and regulatory drivers for key document classes, and does UOSA expect the contractor to translate these into system-enforced retention policies and audit workflows?	UOSA follows the Library of Virginia schedules for record retention: http://old.lva.virginia.gov/agencies/records/sched_local/ .
100	Does UOSA have requirements for role-based access controls and audit logging for operational/safety documents accessed on tablets/mobile devices, and are there restrictions on where such documents may be stored (on-prem only vs cloud permitted)?	UOSA does not have formal policy on access, logging, or restrictions on storage. We would be looking to define this.
101	For "digitize and back up documents which exist only in paper form," should offerors assume physical scanning/indexing labor is within scope under this contract, or is UOSA seeking process/tool modernization with scanning executed by separate resources/vendors?	UOSA is agnostic on the method of digitization and is looking for guidance from the vendor.

102	Please clarify which task areas are expected to require NIST 800-53 and/or NIST 800-82 “working knowledge,” and whether UOSA expects deliverables explicitly mapped to these standards (policies, architectures, control matrices).	Any configuration, implementation, or development should follow the cybersecurity standards laid out in NIST SP 800-53 and SP 800-82. We do not expect explicit mapping to the standards; we’re looking for solutions that conform to cybersecurity best practices, and UOSA follows the NIST standards.
103	The RFP lists 8:00 AM–5:00 PM onsite hours unless prearranged, while Attachment A lists 8:00 AM–4:30 PM typical hours. Please confirm the authoritative onsite access window and whether UOSA anticipates after-hours or shift-based onsite support needs (e.g., cutovers, observation of shift turnover).	The "typical" hours listed are a loose guideline, not an authoritative access window. UOSA is flexible regarding work hours, but certain cutovers may require after-hours support.
104	The RFP states proposals are valid for 120 days; Attachment A states 90 days; RFP later references a “then current 90-day period.” Please confirm the official proposal validity period for this solicitation and which clause governs if inconsistent.	120 day language in Section 3.4 changed to 90 days. See addendum Attachment B.
105	The RFP requests a subcontractor list, but Attachment A states subcontractor use is prohibited absent prior written consent. Please clarify whether subcontractors are permitted if disclosed in the proposal and how/when UOSA provides written consent (at award, per task order, etc.).	The use of subcontractors is permitted with UOSA’s prior consent. Award of a contract based on a proposal identifying subcontractor participation, or issuance of a purchase order referencing a quote that includes subcontractors, shall constitute such consent..
106	How will UOSA evaluate “Price” (10%): will UOSA compare simple hourly rates, or will it normalize with a scenario/team mix? If normalized, what is the scenario?	Please see Cost Summary Worksheet, Attachment C to this addendum. Project cost will be evaluate for foundational initiatives. Average hourly rates will be evaluated for awards for section 2.3 objectives.
107	What contract type will this be (FFP LOE, T&M, CPFF, hybrid)?	Contracts for foundational initiates will be based on fixed project costs. Contracts for Section 2.3 objects will be T&M based on proposed rates.
108	For tasks related to digital transformation objectives, will task orders be competed among all awardees who selected the category in Attachment D, or may some work be direct-awarded?	Those task orders will be competed among all awardees.
109	Given UOSA’s intent to award multiple contracts to vendors with overlapping support areas, how will UOSA coordinate responsibilities to prevent duplication or overlap?	UOSA intends to award multiple contracts to vendors with overlapping support areas; however, this does not imply that task orders will be issued to difference vendors for overlapping support areas. In a situation where future task orders have scope that potentially overlaps, the newly-formed governance committee (from the foundational initiative) will help to resolve these issues. Additionally, there will be UOSA personnel acting as digital transformation champions who will help to resolve any conflicts that arise from a potential overlap of scope between task orders.

110	Would UOSA be open to solutions that provide a secure and scalable data foundation to support the governance, process modernization, analytics, and integration objectives outlined in the RFP, even though infrastructure modernization is not explicitly listed as a requirement?	Yes, UOSA would be open to that.
111	Has UOSA established an estimated budget range or not-to-exceed amount for the two foundational initiatives (IT Governance and Digital Maturity Assessment), either individually or combined?	UOSA does not have an expected budget range for either initiative; we have not completed initiatives like this in the past.
112	For the Digital Maturity Assessment and Roadmap, what is the anticipated timeline for completion of the assessment? Is UOSA expecting this to be completed within the initial contract period ending 6/30/2026, or would it extend into the first renewal period?	We anticipate starting the foundational initiatives in late Spring or early Summer and foresee them taking between 2 - 6 months depending on scope. We prefer that both foundational initiatives be completed by 12/31/2026.
113	Approximately how many task orders does UOSA anticipate issuing in the first 12 months across all awarded contractors?	This depends on the results of the foundational initiatives which will generate and prioritize further initiatives. It also depends on budget considerations which will also be informed by the roadmap initiative.
114	Does UOSA have a preferred cloud platform (e.g., AWS, Azure, GCP) or is the organization currently evaluating cloud strategies as part of this digital transformation?	UOSA does not currently have a preferred cloud platform.
115	Regarding the AVEVA PI System and SCADA data — is this data currently accessible via API or standard integration protocols, or would contractors need to work within AVEVA's proprietary tools for data extraction and visualization?	Depending on the objective, APIs and standard integration protocols will likely be the better choice for integrating with non-SCADA data sources.
116	For the Visualization Tools objective, is UOSA committed to Microsoft Power BI as the primary platform, or is the organization open to evaluating alternative or complementary visualization solutions?	UOSA is open to other platforms or complementary visualization solutions.
117	What is the current state of data integration between the platforms listed in Section 2.4? For example, is there an existing data warehouse, data lake, or integration layer connecting SCADA, LIMS, CMMS (JD Edwards), and other systems, or are these largely siloed?	There is not an existing integration layer; systems are mostly siloed.
118	Section 2.7 references on-site office accommodations. For the Digital Maturity Assessment specifically, does UOSA anticipate a primarily on-site engagement, or would a hybrid model (on-site for stakeholder workshops and interviews, remote for analysis and deliverable development) be acceptable?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.

119	Is there a minimum or preferred level of on-site presence expected per week for contractors performing work under this contract?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
120	Section(s) n/a - Pages n/a: Is there an incumbent currently performing this work? If so, could you please provide the incumbent's name and the contract number?	There is not an incumbent performing this work currently.
121	Section(s) 1.3. Period of Contract and 3.6 Annual Increases - Pages 3, 11: Section 1.3 states, "The initial contract period shall be from date of award until 6/30/2026." Assuming that the award is made in March, this would be an initial contract period of approximately 3 months. However, section 3.6 refers to "the initial 12-month contract period." Can UOSA please clarify the length of the initial contract period and anticipated start date?	RFP Section 1.3 language has been modified to make the initial contract period 1 year and in alignment with the cost increase language. See addendum Attachment B. -Final
122	Section(s) 2.7. Office Accommodations - Pages 8: Will all the work be performed on UOSA premises, or will some work be performed remotely?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
123	Section(s) 3.5. Proposal Organization - Pages 10: To facilitate the Evaluation Committee's review, may Offerors include a table of contents and list of acronyms at the start of the Technical Proposal?	Yes, that's fine.
124	Section(s) 3.5. Proposal Organization - Pages 10: Can UOSA please confirm that there is no page limitation for the Technical Proposal?	There is no prescribed page limit. Offerors should keep proposals succinct and include only the necessary information.
125	Section(s) 3.5. Proposal Organization - Pages 10: Given that A.1 (Company history) and A.2 (Written Narrative) will be evaluated separately, can UOSA please help us understand which corporate experience information should be included in which section? Specifically, A.1 asks for our past performance and "history of performing work as described herein." A.2 asks us to discuss "the Offeror's experience." How are these different from each other?	We realize there is overlap in the requirements of Section 3.5.A.1 & 2. The requirement of A.1 is to provide a brief overview of company history and qualifications while A.2 is a more in depth demonstration with supporting documentation of experience, qualifications, capabilities, etc.
126	Section(s) 3.5. Proposal Organization - Pages 10: A.1 asks for a description of our company's "sales history." Can UOSA please clarify what information is required here?	The use of the term "sales history" in this section should be taken to the type of work performed and for what type of customer.

127	<p>Section(s) 3.5. Proposal Organization - Pages 10: A.2.a and A.2.b. May documentation and resumes be included as appendices to the Technical volume, so as not to interrupt the flow of the narrative?</p>	Yes
128	<p>Section(s) 3.5. Proposal Organization and 3.7. Instructions for Submitting Proposals - Pages 10: 3.5.A.2.d states: "Provide any pricing differences that may occur for these specialties as opposed to the pricing model provided in your Cost Proposal." 3.7.C. states: "Offerors shall ensure that technical and price information is not commingled." Can UOSA please clarify what type of information we should include in response to 3.5.A.2.d (Technical) so we can maintain separation of the Cost and Technical volumes? Or should we include this information in the Cost Proposal instead?</p>	Last sentence of 3.5.A.2.d removed. See addendum Attachment B.
129	<p>Section(s) 3.5. Proposal Organization - Pages 10: A.3: "Confirmation of Compliance with the Specification(s)." •Does "Specification" refer to the Scope of Work? •To address this requirement, is it sufficient to include a statement that we will comply with UOSA's Specifications? •If additional information is required, can UOSA please clarify which information should be included here versus A.2 (Written Narrative)?</p>	Alternative language for this section has been provided in addendum Attachment B.
130	<p>Section(s) 3.5. Proposal Organization - Pages 10: B.1: "The Cost Proposal shall state the hourly rate(s) proposed to provide the Technical/Resource Services as defined herein ... If different rates apply for individual skill levels of team members, include as part of the cost proposal a list of all employees by position/title and skill level. Include the hourly pay rate per individual that will be charged while performing tasks at the client's site." For purposes of the Cost Proposal and identification of Technical/Resource Services, can UOSA provide clarification on the types of labor categories or resource profiles it anticipates utilizing under this contract (e.g., strategic governance advisors, enterprise architects, OT/SCADA engineers, data analysts, project managers, change management specialists)?</p>	See modifications to Section 3.5.B language provided as Attachment B and Cost Summary Sheet provided as Attachment B.

131	Section 1.3 Period of Contract, p3, & 3.4 Duration of Proposals, p9: Given that the initial contract period shall be from date of award until 6/30/2026, will this short duration solely focus on performing an assessment of the current state?	The period of contract language has been updated. See addendum Attachment B.
132	Section 1.3 Period of Contract, p3, & 3.4 Duration of Proposals, p9: How do you envision this engagement progressing beyond the initial 3-month assessment phase? Is it a single contract with options to extend, or would it be a series of separate task orders?	The awards for the foundational initiatives in Section 2.2 will include task orders for the work as outlined. The objectives in Section 2.3 will be separate task orders issued to awarded vendors as the need arises.
133	Section 1.3 Period of Contract, p3, & 3.4 Duration of Proposals, p9: Is the initial 3 month period of performance solely due to fiscal year funding and the overall intent is to have an annual contract starting 7/1/2026 and renew annually on that date?	The period of contract language has been updated. See addendum Attachment B.
134	Section 3.5, B.1., P10: For the pricing, are we providing hourly rates just for the initial assessment/roadmap phase, or do we need to provide a 6-year pricing structure as well? Should our initial pricing be for 3 months and then 12 months, and then annually beginning 7/1 of each year?	Pricing should be submitted as outlined in the attached Cost Summary Worksheet - Attachment C to this addendum.
135	Section 2.5 and 2.6, p8: Can you confirm if resumes are required as part of the proposal submission? If so, what level of detail is expected (e.g. just key personnel, or the full proposed team)? If key personnel only, is UOSA expecting vendors to indicate its Key Personnel?	Resumes should be included for key personnel as well as staff members who will be supporting any technical component of an initiative.
136	Section 2.5 and 2.6, p8: Can you help us understand the reasoning behind the specific skills requirements listed, some of which don't seem directly aligned with the assessment/roadmap objectives?	The skills requirements are for awarding vendors who do not wish to compete for the foundational initiatives but wish to compete for future initiatives related to the objectives defined in 2.3.
137	Section 2.5 pp 7-8: The scope mentions "software setup" as a potential activity. Can you clarify what type of software setup they are expecting, and whether that would be part of the initial 3-month engagement or a later phase?	An example would be setting up a data warehouse for integrating multiple data sources. Software setup would not occur as part of the foundational initiatives but would happen in future initiatives.
138	Section 2.7, page 8: This section indicates that any work conducted at UOSA will be between the hours of 8-5 and offers to provide vendors access to reasonable office accommodations. Is remote work allowable or hybrid working accommodations, i.e., some onsite, some offsite work?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.

139	Section 3.4, p9 and 2.6 on p3: Please clarify: Section 3.9 on page 9 indicates that proposal shall be valid for a minimum of 120 days. Section 2.6 of Attachment A on p3 indicates proposal shall be valise for a minimum of 90 days.	120 day language in Section 3.4 changed to 90 days. See addendum Attachment B.
140	Section 2.1, p4: We understand that UOSA anticipates awarding multiple contracts. How will UOSA keep individual scopes of work separate so vendors are not working at cross-purposes?	UOSA intends to award multiple contracts to vendors with overlapping support areas; however, this does not imply that task orders will be issued to difference vendors for overlapping support areas. In a situation where future task orders have scope that potentially overlaps, the newly-formed governance committee (from the foundational initiative) will help to resolve these issues. Additionally, there will be UOSA personnel acting as digital transformation champions who will help to resolve any conflicts that arise from a potential overlap of scope between task orders.
141	Section 1.3 Period of Contract/3.6 Proposal Organization: Could UOSA clarify if the 12-month firm-pricing requirement extends into the first optional renewal period, or if rates are eligible for a CPI-U adjustment as early as July 1, 2026?	The Period of Contract language has been updated and is now in alignment with the price increase language. See addendum Attachment B.
142	Section N/A: Can the agency provide the time zone the submission deadline falls under?	Eastern Time Zone
143	Section 3.5.A 3.5.A.2.d: To maintain the required separation of technical and price information, should the 'pricing differences' for additional abilities be moved exclusively to the Cost Proposal (Volume II), or does UOSA want them included in the Technical Proposal (Volume I) as a specific exception to Section 3.5.A?	Section 3.5.A.2.d modified to remove references to pricing. See addendum Attachment B.
144	Section 3.1: Does UOSA intend to own the underlying proprietary methodologies, pre-existing frameworks, or software tools used by the contractor to deliver the services, or does the ownership clause apply only to the unique final deliverables created specifically for UOSA?	UOSA would own the deliverables and any software licenses.
145	Section 3.3.B.1: Does UOSA have an expected percentage or mandatory requirement for on-site work versus remote work for the two Foundational Initiatives?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
146	Section 3.4 2.6: Can UOSA clarify the required duration for proposal validity—is it 90 days as per Attachment A or 120 days as per Section 3.4?	120 day language in Section 3.4 changed to 90 days. See addendum Attachment B.

147	Section NA: Once the multi-vendor pool is established, what criteria or process will UOSA use to select a specific vendor for subsequent task orders? Will these task orders be competed among the pool members?	After the foundational initiatives are completed and future initiatives are defined and prioritized, UOSA will request SOWs from the multi-vendor pool for each new initiative. The task orders will be competed among the pool members.
148	Section 3.16: How does UOSA define 'Workmanship' and 'Acceptance' for the purpose of the one-year warranty as it relates to strategic consulting deliverables like the Governance Program and the Digital Roadmap?	The language in the T&Cs is our boilerplate and may not be applicable to every portion of every project. Workmanship and Acceptance shall mean their standard English definitions.
149	Section NA: Will UOSA provide standardized definitions for skill levels (e.g., Junior, Mid, Senior) to ensure that cost proposals are evaluated on a consistent basis?	Please see Cost Summary Worksheet, Attachment C to this addendum.
150	On page 30 of the RFP document, under Objectives, can UOSA advise as to what Document Management will include?	Document Management is defined in section 2.3.E. All the "Objectives" categories on page 30 correspond to the objectives listed in 2.3.
151	Does UOSA currently have any data integration layer or enterprise service bus connecting its major platforms (SCADA, CMMS, LIMS, GIS), or are these systems largely siloed?	No integration layer exists, only one-off integrations. The systems are largely siloed.
152	What is the current state of UOSA's OT/IT network segmentation? Is there a DMZ or data diode between the SCADA network and the business network?	UOSA's IT and OT network architecture is similar to a traditional Purdue model with a next-gen firewall segregating the IT and OT environments with a DMZ network in between.
153	Has UOSA previously conducted any form of technology assessment, strategic IT plan, or digital maturity evaluation? If so, are those documents available to proposing firms?	No, UOSA has not completed any of those assessments or evaluations.
154	Do RFP evaluation criteria include any MBE or onshore/offshore performance requirements?	No
155	Is proposing firm's past volume of UOSA work part of the evaluation?	Past work for UOSA may be considered as part of the References criteria.
156	Attachment B: Solicitation Response form states "Any material exceptions to solicitation specifications, terms or conditions will render an offer nonresponsive. UOSA, in its sole discretion, will determine what constitutes a material exception." Are we prohibited from including proposed modifications to Attachment A – Standard Terms and Conditions, or may proposed exceptions be included with our submission without rendering our submission as non-responsive?	In general we would like our terms and conditions to be accepted fully. We understand that that may not be possible in all circumstances and we may entertain reasonable, limited exceptions depending on service. UOSA still reserves the right to declare proposals submitted with exceptions non-responsive and award will be contingent on successful negotiation of any proposed exceptions to terms and terms and conditions.

157	Could you please confirm if the UOSA RFP 26-10 Digital Transformation Products and Services RFP requires all services to be performed on-site?	There is no minimum on-site presence required; it depends on the nature of work being performed. Certain work benefits from on-site presence, but other types of work can be completed 100% remotely including the use of offshore resources. Secure remote access will be available for offsite development.
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UOSA RFP 26-10 Addendum #4 Attachment B - Modifications to RFP Language

1. RFP Section 1.3 Shall be removed and replaced in its entirety with the following:

1.3 Period of Contract

The initial contract period shall one year from the date of Contract execution. UOSA reserves the right to extend the Contract, one year at a time, and by mutual agreement, for an additional six (6) twelve (12) month periods.

2. The following paragraph shall be appended to RFP Section 3.13 – Evaluation Process

C. UOSA intends to evaluate each proposal for award in one or more of the following categories:

- **Foundational Initiative - Integrated Technology Governance Program Development (Section 2.2.A)**

Award in for this category will likely be to one vendor, however, UOSA reserves the right to award this initiative to multiple vendors if it is deemed to be in the best interests of the Authority. Award in this category will be followed by a task order to complete the entire scope of the work in this section based on the proposed total project cost.

- **Foundational Initiative - Digital Maturity Assessment and Roadmap (Section 2.2.B)**

Award in for this category will likely be to one vendor, however, UOSA reserves the right to award this initiative to multiple vendors if it is deemed to be in the best interests of the Authority. Award in this category will be followed by a task order to complete the entire scope of the work in this section based on the proposed total project cost.

- **Digital Transformation Objectives (Section 2.3)**

UOSA intends to award this category to multiple vendors to cover the range of services required. The form of these contracts will be Blanket Ordering Agreements (BOA) based on proposed rates. The contracts will not include any specific task order and will be used for future work on an as needed basis. When

projects are initiated, UOSA will solicit quotations from selected vendors in accordance with the contracted rates.

3. RFP Section 3.5.A.3 “Confirmation of Compliance with Specifications” shall be removed and replace in its entirety with the following:

Confirmation of Compliance with the Objective(s): The Offeror shall describe how the proposal meets UOSA’s objectives as outlined in Section 2.

4. RFP Section 3.4 – Duration of Proposals

All instances of “120 days” or “120-day” in this section shall be replaced with “90 days” or “90-day” respectively.

5. RFP Section 3.5.A.2.d – The last sentence reading “Additionally, provide any pricing differences that may occur for these specialties as opposed to the pricing model provided in your Cost Proposal.” shall be removed.
6. The first paragraph of RFP Section 3.5.B.1 shall be removed and replaced with the following:

The Cost Proposal shall include a completed Cost Summary Sheet provided as RFP 26-10, Addendum 4, Attachment C. Offeror’s who wish to be considered for award of either foundational initiative in RFP Section 2.2 must include complete, not-to-exceed project pricing in the respective space provided on the Cost Summary Sheet. This price must be inclusive of all fees including travel, expenses, etc.

All Offerors must complete the hourly rate section on the Cost Summary Sheet. In this section offerors shall list the hourly rates for job roles expected may be assigned to UOSA projects. Additionally, the percentage of time the roles would represent in an average project must be listed in third column on the matrix.

Travel and other allowable expenses shall be charged based on actual amounts plus any percentage proposed on the Cost Summary Sheet.

UOSA RFP 26-10 – Addendum #4 – Attachment C - Cost Summary Sheet

This worksheet shall be included as part of your cost proposal.

Foundational Initiatives

- Provide the total project cost based on provided hourly rates and expenses to complete RFP Foundational Initiative - Integrated Technology Governance Program Development (Section 2.2.A): _____
- Provide the total project cost based on provided hourly rates and expenses to complete RFP Foundational Initiative – Digital Maturity Assessment Roadmap (Section 2.2.B): _____

Hourly Rates and Role Distribution:

Please list below the fully burdened hourly rates for all job classifications that may be assigned to UOSA projects. These rates must reflect the invoiced amounts to UOSA. The rates will apply to any contract awarded for this solicitation. The hourly rates should be fully burdened, as invoiced to UOSA rates. In the third column, indicate the estimated percentage of total project work each role would be expected to perform. The percentages entered should collectively total 100%.

UOSA understands that the projects and initiatives for different qualified service categories (from Attachment D) may necessitate different job classifications and corresponding percentages of total project work. Therefore, please duplicate this sheet if you need to provide different rates for the various service categories for which you would like to be considered for award. In this way, UOSA can evaluate firms' cost proposals on a per-category basis. The rates in the table below apply to the following service categories:

Foundational Initiatives		Objectives			
Integrated Tech Governance	<input type="checkbox"/>	Visualization Tools	<input type="checkbox"/>	Proactive and Predictive Process Control	<input type="checkbox"/>
Digital Maturity Assessment	<input type="checkbox"/>	Process Digitization and Streamlining	<input type="checkbox"/>	Document Management	<input type="checkbox"/>
		Communications/Collaboration	<input type="checkbox"/>		

Classification	Fully Burdened Hourly Rate	% work on typical project

Expense Reimbursement:

Expenses such as travel, lodging, meals, etc. shall be reimbursed at actual costs plus a markup of ____%. If blank, markup defaults to 0%.