



Texas Department of Information Resources

Request for Offer (RFO)

**Artificial Intelligence (AI) Products and Services
DIR-CPO-TMP-441**

Issued: July 29, 2021

Version 1.0

Responses Due: September 28, 2021 2:00 PM (CT)

Class	Commodity Code
208	11, 19, 20, 21, 27, 34, 36, 37, 42, 45, 53, 54, 55, 61, 62, 67, 79, 80, 82, 87, 88, 94
209	12, 13, 24, 37, 38, 43, 46, 54, 56, 58, 59, 62, 68, 82, 85, 87, 88, 95
920	03, 04, 05, 07, 13, 14, 15, 16, 17, 19, 21, 22, 24, 27, 30, 32, 34, 38, 39, 40, 41, 45, 46, 49, 56, 63, 65, 66, 75, 76, 77, 84, 90, 91

Table of Contents

1. INTRODUCTION.....	1
1.1..... Solicitation Documents.....	1
1.2..... Purpose	1
1.3..... Background.....	2
1.4..... BidStamp Vendor Information System (VIS) Portal	4
2. SCOPE	5
2.1..... Overview and Scope	5
2.2..... Texas Government Code Chapter 2254	10
2.3..... Emerging Technologies	10
2.4..... Threshold and SOW Requirements.....	10
2.5..... Electronic and Information Resources (EIR) Accessibility.....	10
2.6..... Form of Contract	12
2.7..... Term of Contract	13
2.8..... Option to Extend	14
3. GENERAL INFORMATION	14
3.1..... Point of Contact.....	14
3.2..... Contact with DIR Staff	14
3.3..... Schedule of Events.....	15
3.4..... Historically Underutilized Businesses	16
3.5..... Respondent Qualifications	18
3.6..... Response Deadline and Submission Requirements	20
3.7..... Response Format and Contents	20
3.8..... Rejection of Responses.....	22
3.9..... Right to Amend or Withdraw RFO	23
3.10..... Ownership of Responses.....	23
3.11..... Public Information	23
4. EVALUATION, NEGOTIATIONS, AND AWARD	23
4.1..... Evaluation of Responses.....	23
4.2..... Evaluation Criteria.....	24
4.3..... Presentations, Revised Offer.....	25
4.4..... Negotiations.....	25
4.5..... Award of Contract.....	25
4.6..... Protest Procedures	25

1. Introduction

1.1. Solicitation Documents

This solicitation is made up of the following documents. Successful Respondent shall be responsible for fulfilling all requirements contained in these documents.

- (i) Request for Offer (this document)
- (ii) Exhibit A Respondent Information
- (iii) Exhibit B Respondent History and Experience
- (iv) Exhibit C Contract Marketing and Customer Support Plan
- (v) Exhibit D Sample HUB Subcontracting Plan
- (vi) Exhibit E Itemized Price Sheet
- (vii) Exhibit F EDGAR Certifications for DIR Vendors Form
- (viii) Exhibit G VPAT (for COTS)
- (ix) Exhibit H VADSIR Questionnaire (for Non-COTS)
- (x) Exhibit I Vendor Accessibility Policy Assessment (PDAA)
- (xi) Exhibit J Reference Form
- (xii) Attachment 1 Sample Contract
- (xiii) Attachment 2 Standard Terms and Conditions
- (xiv) Attachment 3 Service Agreement Template

1.2. Purpose

- (a) The purpose of this Request for Offer (RFO) is to solicit responses from potential Respondents to provide Artificial Intelligence (AI) Products and Services to the State of Texas, acting by and through the Department of Information Resources (DIR).
- (b) As a result of this RFO, DIR expects to receive and evaluate Responses and select one (1) or more qualified Respondents with whom to enter into negotiations. [Section 4 Evaluation, Negotiations, and Award](#) of this RFO contains more information regarding evaluation and Respondent selection process. All contract(s) awarded shall be indefinite quantity contracts with no minimum guarantees of any purchases.
- (c) As a result of this RFO, DIR expects to create a contract vehicle that satisfies statewide procurement requirements for AI Products and Services and improves the efficiency of the procurement process by shortening the time required to procure AI Products and Services.
- (d) For administrative efficiency for DIR and its Customers, DIR reasonably anticipates that it will award a finite number of Contracts as determined by the competitive

breaks created through evaluation of Responses.

- (e) As part of DIR's initiatives to identify strategic sourcing opportunities, DIR reserves the right to make a single award or multiple awards as determined by DIR to achieve the highest overall best value to the state.

1.3. Background

1.3.1 Information Technology Acquisition

- (a) Through its Cooperative Contracts Program, DIR assists state agencies and local governments (Customers) with cost-effective acquisition of their information resources by negotiating, managing, and administering contracts with information technology providers. Customers include any Texas state agency, unit of local government, or institution of higher education as defined in Texas Government Code, Section 2054.003; the Electric Reliability Council of Texas, the Lower Colorado River Authority, a private school, as defined by Section 5.001, Education Code, a private or independent institution of higher education, as defined by Section 61.003, Education Code, a volunteer fire department, as defined by Section 152.001, Tax Code, or a public safety entity, as defined by 47 U.S.C. Section 1401, or a county hospital, public hospital, or hospital district; those state agencies purchasing from a DIR contract through an Interagency Agreement, as authorized by Texas Government Code, Chapter 771; any local government as authorized through Texas Government Code, Chapter 791; the Interlocal Cooperation Act; the state agencies and political subdivisions of other states as authorized by Texas Government Code, Section 2054.0565; and for non-telecommunications IT Commodity products and services, "assistance organizations" defined in Texas Government Code, Section 2175.001.
- (b) DIR combines the buying power of authorized Customers to obtain volume-discounted pricing for selected technology products and services. In addition to offering volume-discounted pricing, DIR created the Cooperative Contracts (Co-op Contracts) Program to make it easier for Customers to acquire these products and services. Customers place orders with and issue payments directly to the Successful Respondents participating in the Co-op Contracts Program. Subject to DIR rights, DIR will award and negotiate base contract documents with Respondents. Customers contact the Successful Respondent for product and/or services and pricing information, negotiate their own service level agreements and additional terms and conditions, if any, and send their purchase orders (with the DIR contract number) and payments directly to the Successful Respondent, not to DIR.

Information regarding the Co-op Contracts Program is located on DIR's Web site at <http://dir.texas.gov/View-About-DIR/Pages/Content.aspx?id=41>.

1.3.2 Texas Government Code, Section 2157.068

Texas Government Code, Section 2157.068, generally requires State agencies to buy commodity items, as defined therein, in accordance with contracts developed by DIR, unless the agency obtains an exemption from DIR.

1.3.3 Cost Avoidance Performance Measures

As part of its performance measures reported to state leadership, DIR must show the cost avoidance realized by the State for the products and services obtained under DIR Contracts. Cost avoidance is the difference between the negotiated DIR Contract price and the prevailing market price.

1.3.4 Cost Recovery

DIR recovers the costs of negotiating, executing, and administering the Co-op Contracts through an administrative fee. DIR is authorized to charge a reasonable administrative fee to all customers per Section 2157.068(d) of the Texas Government Code. The administrative fee must be included in the Successful Respondent's price to the Customer and paid to DIR by the Successful Respondent. The fee has been set at a not-to-exceed level of two percent (2.00%) by the current appropriations act of the State Legislature. For the purposes of responding to this RFO, the administrative fee of seventy-five hundredths of a percent (0.75%) shall be used in calculating the pricing specified in Exhibit E Itemized Pricing Sheet. DIR may change the administrative fee at any time during a contract term. DIR will notify Successful Respondents of any change in the administrative fee.

1.3.5 Historical Sales

Contracts negotiated and managed through the Cooperative Contracts Program resulted in over \$6.4 billion in Customer purchases for the past three (3) fiscal years combined. Information contained within the table below shows the total purchases for the past three (3) fiscal years by Customer segment. These purchases represent contracts that are hardware, software, and services related. The State's fiscal year runs September 1st through August 31st.

Table 1: DIR Cooperative Contracts Historical Sales

	2018	2019	2020
Assistance Org	\$2,829,930	\$3,164,738	\$7,470,000
Higher Ed	\$332,385,633	\$347,328,352	\$374,820,000
K-12	\$589,443,871	\$645,821,890	\$851,820,000
Local Government	\$448,121,262	\$556,640,312	\$687,950,000
Out of State	\$19,245,239	\$36,914,182	\$59,450,000
State Agency	\$415,815,401	\$455,482,872	\$606,910,000
Total:	\$1,807,841,336	\$2,045,352,346	\$2,588,420,000

1.4. BidStamp Vendor Information System (VIS) Portal

DIR's BidStamp Vendor Information System (BidStamp VIS) provides prospective bidders (Respondents) with the ability to create a profile that supports the key functions required during the solicitation response process. The high-level processes associated with the portal include vendor account/profile creation, vendor contact creation, vendor account management, and Response submission. In addition to the account management and solicitation response capabilities enabled by the BidStamp VIS portal, Respondents will be able to view open solicitations and additional information about DIR.

1.4.1 VIS Account Request Process

- (a) Before users can access any of the BidStamp VIS portal functionality, they will be required to provide login credentials to access a new or existing account. Respondents may access the BidStamp VIS Portal via <http://dircommunity.force.com/BidStamp>, and enter in their access credentials. If a potential Respondent does not yet have login credentials, the Respondent should request one by clicking on "Are you a Vendor and need to request an account?" button that is located on the login page. **NOTE: THIS PROCESS CAN TAKE UP TO FORTY-EIGHT (48) HOURS TO COMPLETE. INTERESTED PARTIES SHOULD NOT WAIT UNTIL THE CLOSING DATE TO BEGIN THE PROCESS OF CREATING AN ACCOUNT.**
- (b) Instructions for VIS account access and using the BidStamp VIS portal to submit solicitation response can be found on DIR's website [Information for Vendors](#) page.

1.4.2 Solicitation Response Requirement

Any Respondent to this RFO must submit their response through the BidStamp VIS. Persons with disabilities who seek accommodation, under the Americans with Disabilities Act (ADA), in responding to this solicitation may contact DIR at the point of contact in Section [3.1 Point of Contact](#). Please allow at least five (5) Business Days for

response.

1.4.3 BidStamp/VIS Price Form (mandatory requirement when offering brand products)– Instructions:

- (a) Click on "Edit Pricing Form" Button on the RFO Response main page.
- (b) Enter brand name in the "Brand" column. If your offer has more than one (1) discount associated with the brand, you can use the "Category" and "Subcategory" columns, if necessary, to delineate the product discounts.
- (c) Enter the discount being offered to the DIR customer in the "Discount off MSRP" field. Note: Discount off List Price is also acceptable.
- (d) Due to BidStamp/VIS system limitations, please also enter "NA" in the "Product Number" column and select either the "Manufacturer" or "Reseller" checkbox. If there are no entries in these fields when you attempt to save the row, BidStamp/VIS will produce a validation error message.
- (e) Click "Save" in the "Action" Column.

2. Scope

2.1. Overview and Scope

2.1.1 Overview

- (a) The State of Texas, acting by and through the Department of Information Resources (DIR), intends to establish contracts to provide AI, Machine Learning, Robotic Process Automation (RPA), Natural Language Processing (NLP), Computer Vision (CV) and Digital Assistant products and services.
- (b) AI is the use of computers to emulate human (natural) intelligence such as knowledge representation, planning, learning, problem solving, reasoning, natural language processing, and observation. DIR Customers may use AI techniques to assist with forecasting, decision making, automation, and translation in order to optimize tasking traditionally performed by humans and increased productivity and efficiency. AI is an umbrella term that encompasses a wide variety of technologies, methods and platforms to accomplish these tasks.
- (c) It is of special interest to DIR to establish contracts with Respondents that have the history and capacity to provide a comprehensive approach in guiding customers through the array of possible solutions where AI can be integrated and applied in existing and future processes, enabling the customer to take advantage of this emerging technology. DIR is interested in receiving offers where there is the

demonstrated ability to assess Customers' existing technologies and integrate a broad spectrum of the AI techniques and methodologies, from current state assessments to process automation deployment and integration as well as human-machine teaming/training. Preferably, services provided would be able to assist the Customer through all phases in the AI life cycle, from design and development through deployment and continuous monitoring (See GAO's *Artificial Intelligence: An Accountability Framework for Federal Agencies and Other Entities*, June 2021 at <https://www.gao.gov/products/gao-21-519sp>).

- (d) An example of an AI solution would be natural language processing software applications that provide real-time translation and transcription along with keyword-based searches and alert functions. Furthermore, Machine Learning may be integrated with the application to detect and provide analysis of the voice recording for use of slang terms, regional dialects, and semantics. Such solutions may be used by law enforcement entities to automate transcription of inmate recordings originating within a correctional facility and search calls for past of potential criminal events.
- (e) Successful respondents to this RFO should be able to work with Customers on a variety of their specific needs across a broad range of governmental administration functions, such as health, public safety, transportation, housing, outdoors and recreation, employment, occupational and professional licenses, tourism, agriculture, regulatory, justice, and education.
- (f) Standalone hardware is outside the scope of this RFO and only software products and services should be offered. Industrial or manufacturing process automation (e.g., programmable logic controllers (PLCs)) is outside the scope of this RFO.
- (g) Respondents are encouraged to bid any or all or any combination of the categories listed below. Responses may include one (1) or more of the products or services outlined in this Section 2.1.

2.1.2 Artificial Intelligence (AI)

AI can include any one (1) or any combination of the other product and service categories below for the purposes of performing an array of tasks and processes. AI solutions may leverage a Customer's other information technologies including existing databases, software applications, application programming interfaces (API), and cloud services. Hyperautomation, or the application of multiple AI technologies to deliver a solution, is included in this scope. Examples of AI solutions covered by this RFO include, but are not limited to:

- i. Fraud-detection systems;

- ii. Recommendation generation;
- iii. AI workflow integration;
- iv. Data management/optimization for AI optimization (data training);
- v. AI solutions deployment;
- vi. AI governance (organization and oversight);
- vii. Current and future state AI assessments;
- viii. AI use case development;
- ix. AI workflow mapping;
- x. Error checking;
- xi. Automated process mining;
- xii. Human-machine teaming and training;
- xiii. Enterprise AI strategy development and process study;
- xiv. Organization change management for AI solutions deployment;
- xv. Remote infrastructure management; and
- xvi. Training, support and assistance.

2.1.3 Machine Learning

Machine learning is a process that uses rules and procedures to provide advanced statistical analysis or prediction without having to apply explicit instructions. Machine Learning uses datasets streamed into models to describe, recommend or forecast trends and patterns. Examples of machine learning solutions covered by this RFO include, but are not limited to:

- i. Model building/development;
- ii. Model validation/training;
- iii. Model testing/extension;
- iv. Solution assessment and evaluation;
- v. Development;
- vi. Automated forecasting;
- vii. Advanced machine learning algorithm development;
- viii. Rules-based programming in order to draw conclusions or direct an action;
- ix. Deep Learning techniques, including Neural Network methods used to mimic how the human brain functions;
- x. Deep network development and training;
- xi. Advanced predictive analytics;
- xii. Learning algorithm development (supervised, unsupervised, and semi-supervised);
- xiii. Training, support and assistance; and

- xiv. Machine learning integration with Natural Language Processing (NLP) to process regional dialects, slang, and advanced semantics.

2.1.4 Robotic Process Automation (RPA)

Robotic Process Automation (RPA) is when a machine does work that might previously have been done by humans. RPA may learn how to perform such human tasks by observing a human's actions through a graphical user interface (GUI) to then be able to repeat such itself tasks directly in the GUI. RPA technologies may perform complex tasks by automating actions across number of software applications. Unassisted RPA, or advanced RPA that does not require any input from the user, is also included in this scope. Examples of RPA solutions covered by this RFO include, but are not limited to:

- i. Process automation;
- ii. RPA Bots;
- iii. RPA Integration;
- iv. RPA Bot development;
- v. RPA Bot maintenance/support;
- vi. Business process automation;
- vii. Operation automation;
- viii. RPA governance (organization and oversight); and
- ix. Training, support and assistance.

2.1.5 Natural Language Processing (NLP)

Natural Language Processing (NLP) applies to a computer's ability to process and analyze human (natural) language. Examples of NLP solutions covered by this RFO include, but are not limited to:

- i. Read and understand free-form text;
- ii. Text and voice translation;
- iii. Document analysis;
- iv. Voice/speech recognition and segmentation;
- v. Natural language generation (NLG);
- vi. Natural language understanding (NLU);
- vii. Transcription;
- viii. NLP chatbot development;
- ix. NLP chatbot integration services;
- x. Interactive Voice Response (IVR);
- xi. Optical character recognition (OCR);
- xii. Text-to-speech;

- xiii. Sentiment analysis;
- xiv. Automatic summarization;
- xv. Question answering;
- xvi. Training, support, and assistance;
- xvii. Real-time transcription with keyword-based searches and alert functions; and
- xviii. Voice recording analysis.

2.1.6 Computer Vision (CV)

Computer Vision (CV) pertains to a computer's ability to identify and process information from images, including multi-dimensional data, video, and digital images. Examples of CV solutions covered by this RFO include, but are not limited to:

- i. Object recognition;
- ii. Semantic segmentation (ability to categorize object types);
- iii. Facial recognition;
- iv. Image processing;
- v. Image recognition;
- vi. Image analysis;
- vii. Video analytics;
- viii. Pattern recognition; and
- ix. Training, support and assistance.

2.1.7 Digital Assistant

Digital Assistant performs tasks or provide services in response to commands or questions via speech or text (email, SMS, web browser, etc.). Advanced digital assistants may be programmed to learn from data input and continuously improve predictions of user needs. Examples of digital assistant solutions covered by this RFO include, but are not limited to:

- i. Intelligent Virtual Assistant (IVA);
- ii. Virtual assistant integration;
- iii. Virtual assistant development;
- iv. Virtual assistant maintenance/support;
- v. DA chatbot development;
- vi. DA chatbot integration services;
- vii. Dialogue systems;
- viii. Smart device (IoT) management and control;
- ix. Smart calendar/event and other administrative task management;
- x. Phone call/ email or text message automation; and

- xi. Training, support and assistance.

2.2. Texas Government Code Chapter 2254

This RFO is not a solicitation for professional or consulting services as defined in Texas Government Code Chapter 2254.

<https://statutes.capitol.texas.gov/Docs/GV/htm/GV.2254.htm>.

2.3. Emerging Technologies

DIR recognizes that technology is ever evolving and advancing. DIR reserves the right to consider the addition of services to support emerging technology such as next generation, enhancements and upgrades for products or services that are within the scope of DIR-CPO-TMP-441. Successful Respondent may propose such service categories throughout the term of the Contract. In order to meet the needs of Customers, DIR may request the addition of services within scope of this RFO. Pricing and terms will be negotiated upon DIR agreement. Any determination will be at DIR's sole discretion and any decision will be final.

2.4. Threshold and SOW Requirements

- (a) State Agency Customers (not including institutions of higher education), must adhere to the requirements of Texas Government Code 2157.068 relating to DIR Cooperative Contracts and purchasing thresholds.
- (b) In accordance with Texas Government Code 2157.0685, State Agencies are required to submit a draft and final Statement of Work to DIR for review and approval prior to award.
- (c) Threshold and SOW review and signature processes do not apply to Institutions of higher education, K-12, local governments, assistance organizations, or out-of-state Customers.

2.5. Electronic and Information Resources (EIR) Accessibility

Under Texas Government Code, Chapter 2054, Subchapter M, and DIR implementing rules, DIR's state agency and Institution of Higher Education Customers must procure EIR that complies with the accessibility standards defined in the Texas Administrative Codes [1 TAC 206](#), [1 TAC 213](#), and in the [Worldwide Web Consortium WCAG 2.0 AA](#) technical standard as applicable, and when such products or services are available in the commercial marketplace or when such products are developed in response to procurement solicitations.

2.5.1 EIR Form Applicability

All vendors must provide credible accessibility documentation, as applicable:

- a) **For Commercial Off the Shelf (COTS)** products, including Software as a Service (SAAS), a completed Exhibit G **Voluntary Product Accessibility Template (VPAT)** for each product or service included in the submitted pricelist.
- b) **For non-COTS offerings** (such as IT related development services, services that include user accessed, online components, etc.) Vendors must complete a **Vendor Accessibility Development Services Information Request (VADSIR)** (Exhibit H) which documents vendor's capability or ability to produce accessible electronic and information resources.
- c) In addition to the VPAT and VADSIR requirements, vendors must complete the Exhibit I **Policy Driven Adoption for Accessibility (PDAA) for Vendor Self-Assessment** for all solicitations.

2.5.2 VPAT Submission and Review – COTS Offerings

All vendors must complete Accessibility Conformance Reports (ACRs) created using the applicable sections of the Voluntary Product Accessibility Template® (VPAT®) Revised Section 508 Edition (Version 2.3 or higher) or provide links to ACRs located on manufacturer websites for Commercial Off the Shelf (COTS) products, including Software as a Service (SaaS), for each product or product family (as applicable) included in the submitted pricelist. Instructions on how to complete this document are included in the template itself. ACRs based on earlier versions of the VPAT® template will be accepted if such completed ACRs already exist, and there have been no changes to the product or service since the time of the original document completion.

Vendors claiming that a proposed product or family of products is exempt from accessibility requirements must specify the product(s) as such in "Notes" located in the product information section of the VPAT v.2.3 or higher, or as an additional note in the product information section of older VPAT versions of the form, specifying each exempt product or product family with a supporting statement(s) for this position. Vendors not providing ACRs must attest that the documentation does not apply to their product offerings in Item 13 of Exhibit A Respondent Information.

Vendors who do not already have accessibility documentation should complete the form including in the bid package or may obtain the form located here:

<http://www.itic.org/public-policy/accessibility>. Resellers must obtain ACR from the manufacturer or provide links to the manufacturer's accessibility documentation.

DIR will review select documents for credibility and completeness.

Vendors that submit incomplete ACRs or are unable to provide or obtain ACRs for products it manufactures or for products from manufacturers it represents offered in its Response, and ACRs are determined to be applicable, may be required to submit a letter

to be posted on DIR's vendor contract web page, stating that the some or all accessibility documentation status of products may be missing, or not the result of accessibility testing, or may be disqualified from this solicitation. Vendor submissions with missing accessibility documentation or blatantly misrepresented documentation will result in disqualification.

2.5.3 VADSIR Submission and Review – non-COTS Offering

Vendors must complete a VADSIR to documents the vendor's capability or ability to produce accessible electronic and information resources, if the response includes one or more of the following offering types:

- i. Website development services
- ii. Web Application Development Services
- iii. Custom development services as part of an integrated solution
- iv. Client based software application development services
- v. Other software development services containing one or more user interfaces (end user, administrative, etc.)

Vendor submissions are evaluated by DIR as pass or fail. Submissions that do not provide credible evidence of ability or capability through evaluation of the VADSIR will result in disqualification.

Vendors that claim their offerings are exempt from accessibility requirements should include a statement in the VADSIR that they are not offering development services.

Additionally, vendors not providing any VADSIR must attest that the documentation does not apply to their service offerings in Item 13 of Exhibit A Respondent Information.

2.5.4 PDAA Submission and Self-Assessment Score – All Offerings

Vendors must ensure that EIR accessibility criteria are integrated into key phases of the project development lifecycle including but not limited to planning, design, development, functional testing, user acceptance testing, maintenance; and report accessibility status at key project checkpoints as defined by DIR customers.

DIR requires vendors to complete the PDAA Self-Assessment Questionnaire, which generates a self-assessment score. The PDAA is an indicator of the extent to which a vendor's organization has implemented accessibility best practices within operations and integrated accessibility criteria into all phases of a product life cycle.

2.6. Form of Contract

2.6.1 Sample Contract and Terms Negotiation

The final terms and conditions of any Contract shall be agreed upon during negotiation. However, the minimum standard terms and conditions that shall be included in any awarded Contract are contained in the sample Contract for Services attached as **Attachment 1 Sample Contract** and the Standard Terms and Conditions for Services Contracts attached as **Attachment 2**.

2.6.2 Proposed Changes and Exceptions

- (a) **Caution: Respondent's Response may be disqualified if their exceptions are excessive, or if they list exceptions to non-negotiable terms.**
- (b) Item 12 of **Exhibit A Respondent Information** contains the format for Respondent to note any exception to any provision, term, or condition specified in the *Contract for Services* and *Standard Terms and Conditions for Services Contracts*. Respondent should provide any proposed changes to contract language in redline in the "Proposed Language (redline)" column of the chart in Item 12 of **Exhibit A Respondent Information**.
- (c) **Respondents may request exceptions to standard contract terms and conditions, provided that they provide a legally sustainable reason for the exception (i.e., NOT "My prior contract had the same exception"); however, (1) where noted, exceptions to certain terms and conditions will not be allowed. If Respondent is unable to comply with these provisions, the Respondent's Response may be subject to disqualification from further consideration; (2) DIR in its discretion may or may not accept the Respondent's requested exceptions; exceptions submitted without a legally sustainable reason will not be considered; and (3) material deviations (including excessive, additional, inconsistent, conflicting or alternative terms) may render the Offer non-responsive and may result in rejection of the bid.** In addition to the explanation as to why the Respondent cannot comply with the provision, term, or condition, proposed alternative language must be included in the Response. If Respondent fails to note any exception, Respondent will not be allowed to request an exception at some later date.
- (d) DIR reserves the right to make changes to the Contract for Services or the Standard Terms and Conditions for Services Contracts if it is in the best interest of the State to do so. Should this occur prior to the award of any Contract, any Respondent selected for negotiations will be notified.

2.7. Term of Contract

- (a) DIR anticipates an initial contract term of two (2) years with one (1) optional two-

year automatic renewal and one (1) optional one-year automatic renewal under the same terms and conditions, unless either party provides notice to the other party at least sixty (60) days in advance of the renewal date stating that the party wishes to either discuss modifications of terms or non-renewal.

- (b) In the event of prolonged Contract negotiations due to the number and/or significance of exceptions taken, lack of responsiveness, or other failure to close Contract negotiations on the part of Respondent, DIR may, in its sole discretion, elect to terminate negotiations with Respondent, or continue with the current Respondent with a shorter contract term.
- (c) Section [2.6.2 Proposed Changes and Exceptions](#) of this RFO contains the format for Respondents to note any exception to any provision, term, or condition specified in the RFO.

2.8. Option to Extend

The Successful Respondent agrees that DIR may require continued performance beyond the initial or any renewal Contract term, of any of the within described services at the rates specified in the Contract. This option may be exercised more than once, but the total extension of performance hereunder shall not exceed four (4) calendar months. Such extension of services shall be subject to the requirements of the Contract, with the sole and limited exception that the original date of termination shall be extended pursuant to this provision. DIR may exercise this option upon thirty (30) calendar days written notice to the Successful Respondent.

3. General Information

3.1. Point of Contact

All communications regarding this RFO must be addressed in writing to:

Pete Casals CTCD, CTCM
Department of Information Resources
300 W. 15th Street, Suite 1300
Austin, Texas 78701
Email: pete.casals@dir.texas.gov

3.2. Contact with DIR Staff

Upon issuance of this RFO, employees and representatives of DIR other than the Point of Contact identified in Section [3.1 Point of Contact](#) will not discuss the contents of this RFO with any Respondent or their representatives. **Failure of a Respondent and any of its representatives to observe this restriction may result in disqualification of any**

related Response. This restriction does not preclude discussions between affected parties for the purpose of conducting business unrelated to this procurement. Contact with the DIR Historically Underutilized Business (HUB) office is allowed solely for the purpose of addressing HUB Subcontracting Plan (HSP) questions.

3.3. Schedule of Events

3.3.1 RFO Schedule

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

Table 2: Tentative Schedule of Events

Date/Time	Activity
July 29, 2021	Publish RFO on Electronic State Business Daily (ESBD)
August 20, 2021 2:00pm (CT)	Optional Vendor Conference
September 10, 2021 5pm (CT)	Deadline for submitting questions
September 28, 2021 2:00 PM (CT)	Deadline for submitting responses to RFO Deadline for DIR to receive Vendor references
September 29, 2021 – until completed	Evaluation of responses, negotiation and contract execution

3.3.2 Optional Pre-proposal Webinar

The Optional Pre-Proposal Webinar will be held remotely. There is no option for in-person attendance.

3.3.2.1 Webinar Information

- (a) A webinar will be held on the date and time specified in RFO Section [3.3.1](#) above.
- (b) To reserve a webinar seat, register at:
https://www.zoomgov.com/webinar/register/WN_NcXcNg90TQi1vAIIl84pg
- (c) After registering, you will receive a confirmation email containing information about joining the Webinar.
- (d) DIR will provide webinar attendees with an opportunity to submit written questions during the webinar. Although DIR may provide tentative verbal responses to

questions during the webinar, responses are not official until they are posted as an addendum to this RFO on the ESD, <http://www.txsmartbuy.com/esbd>. DIR reserves the right to amend answers prior to the offer submission deadline.

- (e) Any addenda or amendments to this RFO will be posted on the ESD. It is the responsibility of interested parties to periodically check the ESD for addenda and amendments to this RFO prior to submitting a Response. Respondent's failure to periodically check the ESD will in no way release the Respondent from any additional requirements contained in such addenda or amendments, including any resulting additional costs.

3.3.3 Written Questions and Official Answers

- (a) Respondents shall submit all questions regarding this RFO through the BidStamp VIS. **Questions regarding this RFO will be accepted until the date and time specified above in Section 3.3.1, RFO Schedule. NOTE:** Texas observes Daylight Savings Time.
- (b) Official answers will be posted as an Addendum to this RFO, DIR-CPO-TMP-441 on the ESD, <http://www.txsmartbuy.com/esbd>. DIR reserves the right to amend answers that were previously posted as part of an addendum prior to the offer submission deadline.

3.4. **Historically Underutilized Businesses**

- (a) The purpose of the Historically Underutilized Business (HUB) Program is to promote full and equal business opportunities for all businesses in State contracting in accordance with the goals specified in the State of Texas Disparity Study. Each state agency must make a good faith effort to meet or exceed the goals identified below and assist HUBs in receiving a portion of the total contract value of all contracts that the agency expects to award in a fiscal year in accordance with the following procurement goals/percentages:
 - 1. 11.2% for heavy construction other than building contracts;
 - 2. 21.1% for all building construction, including general contractors and operative builders' contracts;
 - 3. 32.9% for all special trade construction contracts;
 - 4. 23.7% for professional services contracts;
 - 5. 26.0% for all other services contracts;
 - 6. 21.1% for commodities contracts.
- (b) It is the policy of DIR to make a good faith effort to achieve the annual program goals by contracting directly with HUBs or indirectly through subcontracting opportunities in accordance with the Texas Government Code, Chapter

2161.252(b), and HUB Rules promulgated by the Comptroller of Public Accounts (CPA), 34 TAC, Chapter 20.

- (c) HUBs are strongly urged to respond to this RFO. Under Texas law, state agencies are required to make a good faith effort to assist HUBs in receiving certain percentages of the total value of contract awards. Respondents who meet the qualifications are strongly encouraged to apply for certification as HUBs.

3.4.1 HUB Subcontracting Plan

DIR has determined that subcontracting is probable under any contract awarded as a result of this RFO. **The HUB Goal for this RFO is 21.1%. ALL RESPONDENTS RESPONDING TO THIS RFO, INCLUDING THOSE THAT ARE HUB CERTIFIED OR THOSE WHO DO NOT PLAN TO SUBCONTRACT, MUST COMPLETE A HUB SUBCONTRACTING PLAN (HSP) IN ACCORDANCE WITH THE STATE'S POLICY ON UTILIZATION OF HUBs. THE HSP MUST BE INCLUDED AS PART OF THE RESPONSE TO THIS RFO. FAILURE TO COMPLETE THE HSP AS INSTRUCTED MAY RESULT IN DISQUALIFICATION OF THE RESPONSE FROM CONSIDERATION.** The State's Policy on Utilization of Historically Underutilized Businesses and HSP forms are available at <https://comptroller.texas.gov/purchasing/vendor/hub/forms.php>. Please review the HSP forms carefully and allow sufficient time to identify and contact HUBs and allow them to respond. **NOTE:** Respondent must demonstrate a good faith effort to contract with new HUBs if currently proposed HUBs have performed as subcontractors to Respondent for more than five (5) years. If Respondent does not plan to subcontract, Respondent must state that fact in their plan. A scan of the original, signed paper copy of the HSP must be uploaded into BidStamp. The completed plan shall become a part of the Contract.

3.4.2 HUB Continuing Performance

Any Contract includes reporting responsibilities related to HUB subcontracting. Successful Respondent shall not change any subcontractor without submitting a revised HUB Subcontracting Plan (HSP). Any change to a subcontractor and revised HSP must be approved in writing by DIR prior to implementation. **Customers are not required to pay for services received from subcontractors that are not part of an approved HSP.**

3.4.3 HUB Resources Available

A list of certified HUBs is available on the Texas Comptroller of Public Accounts (CPA) Website at: <https://mycpa.cpa.state.tx.us/tpasscmbsearch/index.jsp>. For additional information, contact the CPA's HUB program office at StatewideHUBProgram@cpa.texas.gov. If Respondent knows of any businesses that may qualify for certification as a HUB, they should encourage those businesses to contact the

CPA HUB program office.

3.5. Respondent Qualifications

3.5.1 Authorized Respondents

- (a) Any Respondent who is not the manufacturer/publisher of a product included in its Response must supply a signed letter from the manufacturer/publisher certifying that Respondent is an authorized reseller of manufacturer's/publisher's products to the agencies and political subdivisions of the State, including institutions of higher education, and may sell such products under the terms and conditions of the DIR Contract, in support of Respondent's proposal. Signed letters of authorization must be submitted with Respondent's proposal. Failure to supply all letters of authorization will result in elimination of the related product or the entire proposal from the solicitation process.
- (b) Respondents to this RFO must propose to make sales to Customers in one (1) of the following ways:
 - i. Respondent will sell directly to Customers through a Co-op Contract.
 - ii. Respondent will execute a Co-op Contract with DIR and designate one (1) or more qualified dealers or resellers to sell directly to Customers on its behalf. Respondent may also sell directly to Customers.

3.5.2 Federal Requirements

- (a) State agencies are prohibited from doing business with terrorists and terrorist organizations. Any Respondent listed in the prohibited Vendor list authorized by Executive Order #13224, *"Blocking Property and Prohibiting Transactions with Persons Who Commit, Threaten to Commit, or Support Terrorism"*, published by the United States Department of the Treasury, Office of Foreign Assets Control (Terrorism List) shall not be awarded a Contract as a result of this RFO. Any Respondent awarded a Contract must agree that if at any time during the term of the Contract the Respondent is listed on the Terrorism List, the Respondent shall promptly notify DIR. As part of DIR's contract management, periodic checks will be performed to ensure Respondent remains in compliance with these Federal Requirements. DIR shall have the absolute right to terminate the Contract without recourse in the event Respondent becomes listed on the Terrorism List.
- (b) Should any Respondent become suspended or debarred from doing business with the federal government as listed in the *System for Award Management (SAM)* maintained by the General Services Administration, the Respondent's Contract will be terminated without recourse.

- (c) Respondent shall comply with any Federal Executive Order issued banning an entity or foreign country.
- (d) Respondent shall comply with the requirements of the Immigration and Reform Act of 1986, the Illegal Immigration Reform and Immigrant Responsibility Act of 1996 ("IIRIRA"), and the Immigration Act of 1990 (8 U.S.C.1101, et seq.) regarding employment verification and retention of verification forms for any individual(s) hired on or after the effective date of the 1996 Act who will perform any labor or services under this Contract.
- (e) The Education Department of General Administrative Regulations (EDGAR) are the federal regulations that govern all federal grants awarded by the U.S. Department of Education on or after December 26, 2014. EDGAR encourages the use of cooperative agreements for procurement or use of common or share goods and services in order to foster greater economy and efficiency. DIR uses an open market competitive procurement process to award contracts as required by Texas Government Code 2054 and 2157. If Respondent provides evidence of its EDGAR compliance that DIR to the best of information and belief, finds to be satisfactory, then DIR may identify Respondent as certifying that all or a portion of Respondent's listings are EDGAR eligible, and DIR may then permit Respondent to so identify all or part of its offerings on Respondent's DIR website. In such cases, upon request from eligible Customer, Respondent must complete EDGAR certification affirmation forms to satisfy Customer requirement.

3.5.3 Respondent Performance and Debarment

In accordance with 34 TAC, Chapter 20, Subchapter C, Respondent that is debarred from doing business with the State of Texas will not be awarded a Contract. The list of debarred vendors is located on the CPA Web site at:

<https://comptroller.texas.gov/purchasing/programs/vendor-performance-tracking/debarred-vendors.php>

3.5.4 Required Respondent and Subcontractor Current and Former State Employee Disclosures

Respondent shall disclose, for itself and on behalf of all of its Subcontractors, in its response to **Exhibit A Respondent Information, Section 15 Respondent and Subcontractor Conflict of Interest Disclosure**, all of the following:

- i. Any current or former employees of Respondent who will spend twenty percent (20%) or more of their time on the Contract and are current or former employees of DIR within the past five (5) years;

- ii. Any proposed Respondent personnel assigned to work directly on the Contract twenty percent (20%) or more of their time who are related within two (2) degrees of consanguinity of any current or former employees of DIR. Disclosure of former state employees may be limited to the last five (5) years; and
- iii. Respondent will certify that they are in compliance with Texas Government Code, Title 6, Subtitle B, Section 669.003, relating to contracting with the executive head of a state agency. If Section 669.003 applies, Respondent will complete the following information in order for the Response to be evaluated: Name of Former Executive, Name of State Agency, Date of Separation for State Agency, Position with Respondent, and Date of Employment with Respondent.

3.5.5 Cybersecurity Training

In accordance with Section 2054.5192, Texas Government Code, for any contract with a state agency or institution of higher education, if Respondent, or a subcontractor, officer, or employee of Respondent, will have access to a state computer system or database, then Respondent shall ensure that such officer, employee, or subcontractor shall complete a cybersecurity training program certified under Section 2054.519, Texas Government Code, as selected by Customer state agency. The cybersecurity training program must be completed by such officer, employee, or subcontractor during the term of the contract and during any renewal period. Respondent shall verify to the Customer state agency or institution of higher education completion of the program by each such officer, employee, or subcontractor.

3.6. Response Deadline and Submission Requirements

Respondents are invited to submit Responses in accordance with the requirements outlined in this document. Responses must be received by DIR on or before the solicitation response due date listed in [Table 3: Tentative Schedule of Events](#). **No late Responses will be reviewed.** No facsimile or e-mail responses shall be accepted unless otherwise indicated in an addendum on the ESD, provided that DIR may, in its sole discretion, grant an accommodation upon a showing of good cause by a Respondent.

3.6.1 Official Timepiece

The system clock in the BidStamp VIS is the official timepiece for determining compliance with the deadline. All responses will be date and time stamped electronically in the BidStamp VIS. If an accommodation is granted by DIR, the official timepiece for such Responses will be the date and timestamp showing when the Response was received at the email address or facsimile number designated by DIR for such Responses.

3.7. Response Format and Contents

Per Section [1.4.1](#) VIS Account Request Process, any Respondent responding to this RFO must submit their response through the BidStamp VIS unless granted an accommodation by DIR by the appropriate deadline.

3.7.1 Mandatory Response Contents

RESPONDENT MUST PROVIDE THE ITEMS LISTED BELOW OR THE RESPONSE WILL BE REJECTED.

a) **Exhibit A Respondent Information**

This form must be filled out in its entirety and signed by an officer or agent empowered to contractually bind the Respondent. Respondent's Response should offer information to support its capability to provide the products and services required in this RFO. Exhibit A, **Attachments 1 and 2 must be completed and submitted with the Response if applicable per Item (xx), Canceled Contracts.**

b) **Exhibit B Respondent History and Experience**

Respondent's Response should offer information to support its capability to provide the products and services required in this RFO.

c) **Exhibit C Contract Marketing and Customer Support Plan**

Respondent shall provide a plan that describes the Respondent's ability and strategy for promoting and supporting the Contract, if awarded. Successful Respondent shall be responsible for following the plan to ensure Customer sales under the Contract.

d) **Sample HUB Subcontracting Plan– See Exhibit D of this RFO**

All Successful Respondents, **INCLUDING THOSE WITH HUB DESIGNATION AND THOSE THAT DO NOT PLAN TO USE SUBCONTRACTORS**, must submit a HUB Subcontracting Plan (HSP). **The HUB Subcontracting Plan Form is provided at <https://comptroller.texas.gov/purchasing/vendor/hub/forms.php>.** Refer to Section [3.4 Historically Underutilized Businesses](#) for more information regarding HUB subcontracting. **NOTE: For the purposes of the HUB Subcontracting Plan, Order Fulfillers designated by a manufacturer or publisher to sell directly to Customers on its behalf are considered subcontractors. The signed copy of the HSP must be uploaded and submitted in the BidStamp VIS.**

e) **Exhibit E Itemized Price Sheet**

Respondent shall provide a detailed description and the specific pricing for any services that Respondent is proposing to offer in response to this RFO. Products and services should be listed in the Excel spreadsheet that is attached as **Exhibit E**.

Respondent shall provide specific pricing for the products and services applicable to

their response.

f) **Manufacturer Reseller Authorization Letters**

Respondent responding to this RFO as a Reseller of the AI products must submit the manufacturer's reseller authorization letter. Refer to Section 3.5.1 for detailed information.

g) **Service Agreements (if any)**

Respondent shall provide any Service Agreements that are applicable to the services Respondent is proposing. These Agreements must, at a minimum, allow and provide for inclusion of the terms and conditions of the Attachment 1 Contract and Attachment 2 Standard Terms and Conditions.

h) **Exhibit F EDGAR Certifications for DIR Vendors Form**

Respondents must provide the **Exhibit F EDGAR Certification for DIR Vendors Form** as requested in [Section 3.5.2](#), Federal Requirements, of this RFO.

3.7.2 References

Respondent must send the Exhibit J Reference Form to a minimum of three (3) companies or government agencies able to assess the Respondent's performance on contracts of similar scope. Instructions are included on the questionnaire. Respondent may submit the Exhibit J Reference Form to companies or government agencies through the BidStamp VIS. DIR is not responsible for undeliverable e-mails or for non-responsive references. References must respond to DIR on the form provided by the due date in order to be considered for evaluation. Exhibit J Reference Form must be submitted directly from the reference to DIR. The Respondent may not submit the reference form to DIR. DIR may contact references for clarification at DIR's discretion.

3.7.3 Accessibility of Electronic Response Documents

Respondent's Response should be submitted in a format that is accessible to people with disabilities. This can include, but is not limited to accessible Office, Adobe PDF, or other productivity document suites.

3.8. Rejection of Responses

DIR has sole discretionary authority and reserves the right to reject any and all Responses received as a result of this RFO. Responses that do not comply with the mandatory submission requirements may be rejected. In addition, DIR reserves the right to accept or reject, in whole or in part, any Responses submitted, and to waive minor technical deficiencies when in the best interest of the State.

3.9. Right to Amend or Withdraw RFO

- (a) DIR reserves the right to alter, amend or modify any provision of this RFO, or to withdraw this RFO, in whole or in part, at any time prior to the award of a contract if to do so is in the best interest of the State. DIR reserves the right to re-solicit for the same or similar products and services whenever it determines re-solicitation to be in the best interest of the State.
- (b) DIR shall not be responsible or liable for any cost incurred by any Respondent in the preparation and submission of its response to this RFO or for other costs incurred by participating in this procurement process.

3.10. Ownership of Responses

All Responses become the property of DIR. DIR reserves the right to use any and all information or materials presented in response to this RFO. Disqualification of a Respondent's Response does not eliminate this right.

3.11. Public Information

- (a) DIR is a government agency subject to the Texas Public Information Act. Responses submitted to DIR as a result of this RFO are subject to release as public information after contracts are executed or if the procurement is terminated. Respondent may not mark its complete proposal "copyrighted" or mark every page as proprietary or confidential but if a Respondent believes that its Response, or parts of its Response, may be exempted from disclosure under Texas law, Respondent must specify page-by-page and line-by-line the parts of the Response that it believes are exempt. In addition, Respondent must specify which exception(s) are applicable and provide detailed reasons substantiating the exception(s).
- (b) The Office of the Attorney General (OAG) has the sole authority to determine whether information is confidential and not subject to disclosure under the Public Information Act. DIR shall comply with all decisions of the OAG.
- (c) DIR assumes no responsibility for asserting legal arguments on behalf of any Respondent. Respondents are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.

4. Evaluation, Negotiations, and Award

4.1. Evaluation of Responses

DIR will review proposals to determine responsiveness to this RFO. All determinations about responsiveness to this RFO are final. All proposals determined to be responsive

will go through a financial review overseen by the Chief Financial Office. **The financial review is a pass/fail determination that is final.** Only Responses that receive a passing grade will proceed to the evaluation committee. DIR will establish an evaluation committee to review all Responses that have not been rejected. At any time during the evaluation process, DIR may ask any or all Respondents to elaborate on or clarify specific points or portions of their Response. DIR's request and Respondent's elaborations or clarifications shall be in writing. Once initial evaluation of Responses has been completed, the evaluation committee shall provide the tabulated scores to the DIR purchasing office and shall conclude their duties.

4.2. Evaluation Criteria

4.2.1 Pass/Fail Criteria

In addition to the criteria listed below DIR also reviews additional Pass/Fail criteria as follows:

1. Financial Review - DUNS Number and report is a Pass/Fail review conducted by the Finance Group (**Exhibit A Respondent Information**)
2. Compliance with applicable provisions of §2155.074, 2155.075, 2156.007, 2157.003, and 2157.125, Gov't Code. Respondents may fail this selection criterion for any of the following conditions:
 - a. A score of less than C in the Vendor Performance System;
 - b. Currently under a Corrective Action Plan through the CPA, having repeated negative Vendor Performance Reports,
 - c. Having purchase orders that have been cancelled in the previous twelve (12) months for non-performance (including but not limited to late delivery, etc.).
3. Completion of HUB Subcontracting Plan (See **Exhibit D Sample HUB Subcontracting Plan**).

4.2.2 Weighted Evaluation Criteria

(a) The criteria to be used in determining the best value for the State are as follows, in order of importance/weight:

- 1. Product and Services Pricing (Exhibit E) – 40%**
- 2. Contract Marketing and Customer Support Plan – 30%**
 - a. Respondent's plan for supporting the Contract, if awarded. DIR will score Respondent's specific responses to the following:
Exhibit C Contract Marketing and Customer Support Plan

3. Respondent Experience – 30%

- a. Respondent's experience in providing the products and services requested as detailed in **Exhibit B Respondent History and Experience**, inclusive of references received on **Exhibit J Reference Form**, and performance under existing and prior contracts for similar products or services that may include consideration of Vendor performance as recorded in the CPA Vendor Performance Tracking System as described in the Texas Administrative Code, 34 TAC 20.115(b).

4.3. Presentations, Revised Offer

- (a) DIR in its discretion shall make the determination whether to request presentations and/or engage in a revised offer process. Both presentations and the revised offer process, if held, may be scored.
- (b) DIR reserves the right to continue to evaluate Responses until such point as the best value, as defined by Texas Government Code, Section 2157.003, is obtained for the State.

4.4. Negotiations

At the conclusion of the evaluation, presentations, and revised offers (if applicable), as described within Sections [4.1 Evaluation of Responses](#) through [4.3 Presentations, Revised Offer](#) above, DIR staff shall determine the number of Respondents with which it will start contract negotiations. In its discretion, DIR shall terminate contract negotiations when DIR determines that the best value for the State has been obtained.

4.5. Award of Contract

- (a) DIR Executive Management shall approve the decision to award any Contracts, if in the best interest of DIR and the State to do so. The decision of Executive Management on any award is final. Any award for this RFO shall be posted under DIR-CPO-TMP-441, on the Electronic State Business Daily, <http://www.txsmartbuy.com/esbd>, upon execution of a Contract with one (1) or more Successful Respondents. All Responses and working papers pursuant to this RFO are not subject to disclosure under the Public Information Act until all Contracts resulting from this RFO have been executed.
- (b) Any Contract resulting from this solicitation is contingent upon the continued availability of lawful appropriations by the Texas Legislature.

4.6. Protest Procedures

Any Respondent who is aggrieved in connection with this RFO, evaluation, or award of a contract may formally protest to DIR in accordance with the Respondent protest

procedures posted on the DIR Web site at: <http://dir.texas.gov/View-Information-For-Vendors/Pages/Content.aspx?id=21>.

END OF RFO

Addendum 1

SOLICITATION NUMBER:	DIR-CPO-TMP-441
SOLICITATION NAME:	Artificial Intelligence (AI) Products and Services
ADDENDUM NUMBER:	1

Addendum Date: August 25, 2021

If you should have any questions regarding this Addendum, please contact:

Pete Casals
Department of Information Resources
300 W. 15th Street, Suite 1300
Austin, Texas 78701
Internet: pete.casals@dir.texas.gov

Notice is given to Respondents desiring to submit a response to the above referenced solicitation that additional information is required:

This Addendum modifies the solicitation for Artificial Intelligence (AI) Products and Services, Solicitation No. DIR-CPO-TMP-441, released July 29, 2021. It informs the parties that:

Pre-Proposal Conference Slides, Pre-Proposal Conference Attendee List, and Pre-Proposal Video Link have been provided.

In the submission of its Response to this solicitation, Respondents shall submit this signed “page one” of the Addendum, acknowledging receipt of the Addendum.

Respondent Acknowledgment of Receipt

(printed entity name)

(printed name of authorized representative)

(signature of authorized representative)

(date)

This addendum to Request for Offer DIR-CPO-TMP-441:

1. Includes Pre-Proposal Conference Presentation Slides;
2. Includes Pre-Proposal Conference Attendees List;
3. Includes Pre-Proposal Conference Video

1. **PRE-PROPOSAL CONFERENCE PRESENTATION SLIDES**

Please see the following pages.

2. **PRE-PROPOSAL CONFERENCE ATTENDEES LIST**

Please see the following pages.

3. **PRE-PROPOSAL CONFERENCE VIDEO**

Video Link: <https://youtu.be/oErFHQkxnnY>

Artificial Intelligence (AI) Products and Services Request for Offer DIR-CPO-TMP-441

Vendor Pre-Bid
Conference

Friday, August 20, 2021

2:00 PM (CT)

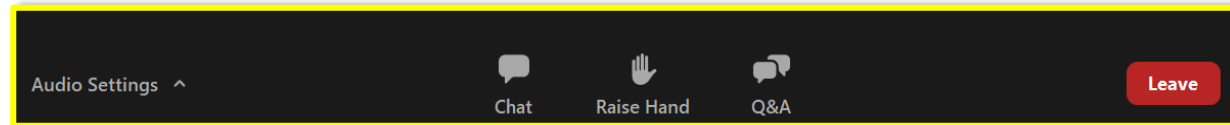


Texas Department of Information Resources

Transforming How
Texas Government
Serves Texans

Welcome & Zoom Webinar Notes

- Change Audio by switching between Computer Audio and Phone Call.
- Attendees are **Muted**
- Click the **Raise Hand** icon to confirm audio levels
- Submit all questions via the **Q&A** in the Meeting Controls



Introduction of Speakers and Staff



**Stephanie Harrison, Manager
Statewide Procurements**



**Lynn Hodde, Director
HUB, Outreach and Training**



**Theresa Williamson
HUB Coordinator**



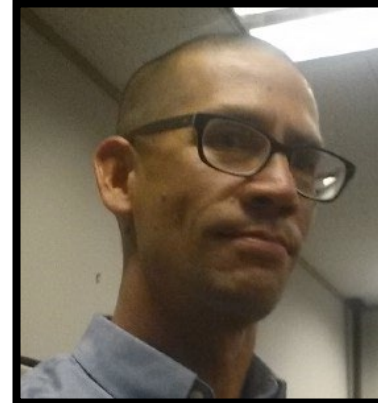
**John Hoffman
Chief Technology Officer
& Deputy State Chief
Information Officer**



**Colleen Berkley, Director
Procurement Services**



**Elizabeth Cooper, Program Director
Statewide EIR Accessibility**



**Pete Casals
Procurement Lead**

Agenda

Request for Offer (RFO)

- RFO Overview
- RFO Contents
- RFO Scope
- Evaluation Criteria
- Term of Contracts
- Schedule
- HUB
- Pricing Sheet
- EIR

General Information

BidStamp Vendor Information System Portal (VIS) Overview

Mandatory Submissions

Break

Questions

Conference Closing



RFO Overview

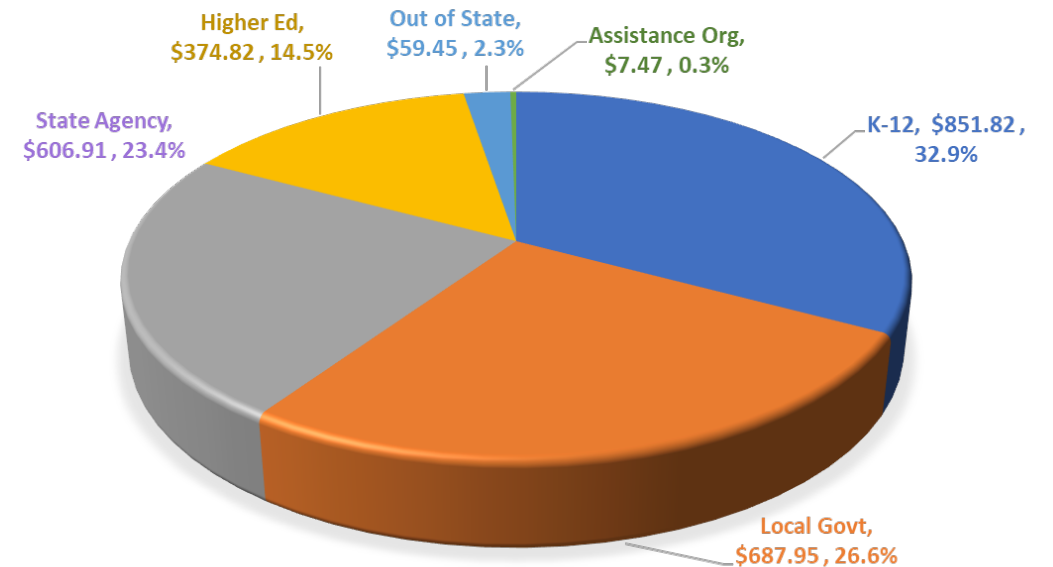
- The purpose of this Request for Offer (RFO) is to solicit responses from potential Vendors to provide **Artificial Intelligence (AI) Products and Services**, to the State of Texas, acting by and through the Department of Information Resources (DIR).
- New RFO to support DIR's Artificial Intelligence (AI) Center of Excellence (CoE)
- DIR may make multiple awards from this RFO.

RFO Overview Cont'd: **Historical Sales**

DIR Cooperative Contract Program Sales:

	2018	2019	2020
Assistance Org	\$2,829,930	\$3,164,738	\$7,470,000
Higher Ed	\$332,385,633	\$347,328,352	\$374,820,000
K-12	\$589,443,871	\$645,821,890	\$851,820,000
Local Government	\$448,121,262	\$556,640,312	\$687,950,000
Out of State	\$19,245,239	\$36,914,182	\$59,450,000
State Agency	\$415,815,401	\$455,482,872	\$606,910,000
Total:	\$1,807,841,336	\$2,045,352,346	\$2,588,420,000

FY 20 SALES BY CHANNEL



RFO Overview Cont'd: **RFO Contents**

- **Request for Offer (RFO) DIR-CPO-TMP-441**
 - Exhibit A Respondent Information
 - Exhibit B Respondent Experience
 - Exhibit C Contract Marketing and Support Plan
 - Exhibit D HSP Sample Form
 - Exhibit E Itemized Price Sheet
 - Exhibit F EDGAR Certification Form
 - Exhibit G VPAT (for COTS)
 - Exhibit H VADSIR (for Non-COTS)
 - Exhibit I Vendor Accessibility Policy Assessment
 - Exhibit J Reference Form
- Attachment 1 Sample Contract
- Attachment 2 Standard Terms and Conditions
- Attachment 3 Service Agreement Template



Request for Offer



Request for Offer & Exhibits A, B, C & D

- RFO DIR-CPO-441
 - Vendor Information System (VIS) Portal - BidStamp
 - Scope
 - Pricing
 - Submission requirements, etc.
 - Evaluation, Negotiations, and Award
-
- Exhibit A, Vendor Information Form
 - Exhibit B, Vendor History and Experience
 - Exhibit C, Contract Marketing and Support Plan
 - Exhibit D, Historically Underutilized Business (HUB) Subcontracting Plan (The HUB Subcontracting Plan Form is provided in the BidStamp VIS portal.)

Term of Contract

Section 2.7 Term of Contract

- The term of any Contract awarded from this RFO shall be **two (2) years** commencing on the last date of approval by DIR and Vendor.
- The contract will **renew automatically** in one (1) optional two (2) years renewal and one (1) optional one (1) year renewal under the same Terms and Conditions, unless either party provides notice to the other party 60 days in advance of the renewal date stating that the party wishes to discuss modification of terms or not renew.



RFO Schedule

Section 3.3.1 Anticipated Schedule:

Date/Time	Activity
July 29, 2021	Publish RFO on Electronic State Business Daily
August 20, 2021 2:00pm (CT)	Optional Pre-Proposal Webinar
September 10, 2021 5pm (CT)	Estimated deadline for submitting questions
September 28, 2021 2:00 PM (CT)	Deadline for DIR to receive Vendor references Deadline for submitting responses to RFO
September 29, 2021 – until completed	Evaluation of responses, negotiations, and contract execution

Evaluation Criteria

RFO Section 4.1 – Evaluation of Responses

- Incomplete response package will be rejected
- The financial review and HSP review are on a pass/fail basis.
- Failure to provide a DUNs number may result in your response being disqualified.
- Only responses that receive the passing grade will proceed to the next evaluation phase.

RFO Section 4.2.2 – Evaluation Criteria

- Products and Services Pricing – 40%
- Vendor's Contract Marketing and Support Plan – 30%
- Vendor's History and Experience – 30%



Exhibits A, B, & C

Exhibit A, Vendor Information

- This form must be **filled out in its entirety** and **signed by an officer or agent empowered to contractually bind the Respondent**. Complete cancelled contract references if applicable.

Exhibit B, Vendor History and Experience

- Respondent must provide a detailed response to each question detailing the Vendor's history and experience in providing the products and services proposed.

Exhibit C, Contract Marketing and Support Plan

- Respondent must provide a plan that describes the Respondent/Vendor's ability and strategy for promoting and supporting the contract, if awarded.



RFO Scope

2.1.1 Overview

- (a) The State of Texas, acting by and through the Department of Information Resources (DIR), intends to establish contracts to provide **AI, Machine Learning, Robotic Process Automation (RPA), Natural Language Processing (NLP), Computer Vision (CV) and Digital Assistant** products and services.
- (b) AI is the use of computers to emulate human (natural) intelligence such as knowledge representation, planning, learning, problem solving, reasoning, natural language processing, and observation. DIR Customers may use AI techniques to assist with forecasting, decision making, automation, and translation in order to optimize tasking traditionally performed by humans and **increased productivity and efficiency**. AI is an umbrella term that encompasses a wide variety of technologies, methods and platforms to accomplish these tasks.
- (c) It is of special interest to DIR to establish contracts with Respondents that have the history and capacity to provide a **comprehensive approach** in guiding customers through the array of possible solutions where AI can be integrated and applied in existing and future processes, enabling the customer to take advantage of this emerging technology. DIR is interested in receiving offers where there is the demonstrated ability to assess Customers' existing technologies and integrate a broad spectrum of the AI techniques and methodologies, from current state assessments to process automation deployment and integration as well as human-machine teaming/training. Preferably, services provided would be able to **assist the Customer through all phases in the AI life cycle**, from design and development through deployment and continuous monitoring (See GAO's Artificial Intelligence: An Accountability Framework for Federal Agencies and Other Entities, June 2021 at <https://www.gao.gov/products/gao-21-519sp>).



2.1.1 Overview continued...

- (d) An example of an AI solution would be natural language processing software applications that provide real-time translation and transcription along with keyword-based searches and alert functions. Furthermore, Machine Learning may be integrated with the application to detect and provide analysis of the voice recording for use of slang terms, regional dialects, and semantics. Such solutions may be used by law enforcement entities to automate transcription of inmate recordings originating within a correctional facility and search calls for past of potential criminal events.
- (e) Successful respondents to this RFO should be able to work with Customers on a variety of their specific needs across a broad range of governmental administration functions, such as health, public safety, transportation, housing, outdoors and recreation, employment, occupational and professional licenses, tourism, agriculture, regulatory, justice, and education.
- (f) Standalone hardware is outside the scope of this RFO and only software products and services should be offered. Industrial or manufacturing process automation (e.g., programmable logic controllers (PLCs)) is outside the scope of this RFO.
- (g) Respondents are encouraged to bid any or all or any combination of the categories listed below. Responses may include one (1) or more of the products or services outlined in this Section 2.1.



2.1.2 Artificial Intelligence (AI)

AI can include any one (1) or any combination of the other product and service categories below for the purposes of performing an array of tasks and processes. AI solutions may leverage a Customer's other information technologies including existing databases, software applications, application programming interfaces (API), and cloud services. Hyperautomation, or the application of multiple AI technologies to deliver a solution, is included in this scope. Examples of AI solutions covered by this RFO include, but are not limited to:

- i. Fraud-detection systems;
- ii. Recommendation generation;
- iii. AI workflow integration;
- iv. Data management/optimization for AI optimization (data training);
- v. AI solutions deployment;
- vi. AI governance (organization and oversight);
- vii. Current and future state AI assessments;
- viii. AI use case development;
- ix. AI workflow mapping;
- x. Error checking;
- xi. Automated process mining;
- xii. Human-machine teaming and training;
- xiii. Enterprise AI strategy development and process study;
- xiv. Organization change management for AI solutions deployment;
- xv. Remote infrastructure management; and
- xvi. Training, support and assistance.



2.1.3 Machine Learning

Machine learning is a process that uses rules and procedures to provide advanced statistical analysis or prediction without having to apply explicit instructions. Machine Learning uses datasets streamed into models to describe, recommend or forecast trends and patterns. Examples of machine learning solutions covered by this RFO include, but are not limited to:

- i. Model building/development;
- ii. Model validation/training;
- iii. Model testing/extension;
- iv. Solution assessment and evaluation;
- v. Development;
- vi. Automated forecasting;
- vii. Advanced machine learning algorithm development;
- viii. Rules-based programming in order to draw conclusions or direct an action;
- ix. Deep Learning techniques, including Neural Network methods used to mimic how the human brain functions;
- x. Deep network development and training;
- xi. Advanced predictive analytics;
- xii. Learning algorithm development (supervised, unsupervised, and semi-supervised);
- xiii. Training, support and assistance; and
- xiv. Machine learning integration with Natural Language Processing (NLP) to process regional dialects, slang, and advanced semantics.



2.1.4 Robotic Process Automation (RPA)

Robotic Process Automation (RPA) is when a machine does work that might previously have been done by humans. RPA may learn how to perform such human tasks by observing a human's actions through a graphical user interface (GUI) to then be able to repeat such itself tasks directly in the GUI. RPA technologies may perform complex tasks by automating actions across number of software applications. Unassisted RPA, or advanced RPA that does not require any input from the user, is also included in this scope. Examples of RPA solutions covered by this RFO include, but are not limited to:

- i. Process automation;
- ii. RPA Bots;
- iii. RPA Integration;
- iv. RPA Bot development;
- v. RPA Bot maintenance/support;
- vi. Business process automation;
- vii. Operation automation;
- viii. RPA governance (organization and oversight); and
- ix. Training, support and assistance.



2.1.5 Natural Language Processing (NLP)

Natural Language Processing (NLP) applies to a computer's ability to process and analyze human (natural) language. Examples of NLP solutions covered by this RFO include, but are not limited to:

- i. Read and understand free-form text;
- ii. Text and voice translation;
- iii. Document analysis;
- iv. Voice/speech recognition and segmentation;
- v. Natural language generation (NLG);
- vi. Natural language understanding (NLU);
- vii. Transcription;
- viii. NLP chatbot development;
- ix. NLP chatbot integration services;
- x. Interactive Voice Response (IVR);
- xi. Optical character recognition (OCR);
- xii. Text-to-speech;
- xiii. Sentiment analysis;
- xiv. Automatic summarization;
- xv. Question answering;
- xvi. Training, support, and assistance;
- xvii. Real-time transcription with keyword-based searches and alert functions; and
- xviii. Voice recording analysis.



2.1.6 Computer Vision (CV)

Computer Vision (CV) pertains to a computer's ability to identify and process information from images, including multi-dimensional data, video, and digital images. Examples of CV solutions covered by this RFO include, but are not limited to:

- i. Object recognition;
- ii. Semantic segmentation (ability to categorize object types);
- iii. Facial recognition;
- iv. Image processing;
- v. Image recognition;
- vi. Image analysis;
- vii. Video analytics;
- viii. Pattern recognition; and
- ix. Training, support and assistance.



2.1.7 Digital Assistant

Digital Assistant performs tasks or provide services in response to commands or questions via speech or text (email, SMS, web browser, etc.). Advanced digital assistants may be programmed to learn from data input and continuously improve predictions of user needs. Examples of digital assistant solutions covered by this RFO include, but are not limited to:

- i. Intelligent Virtual Assistant (IVA);
- ii. Virtual assistant integration;
- iii. Virtual assistant development;
- iv. Virtual assistant maintenance/support;
- v. DA chatbot development;
- vi. DA chatbot integration services;
- vii. Dialogue systems;
- viii. Smart device (IoT) management and control;
- ix. Smart calendar/event and other administrative task management;
- x. Phone call/ email or text message automation; and
- xi. Training, support and assistance.



2.2. **Texas Government Code Chapter 2254**

This RFO is not a solicitation for professional or consulting services as defined in Texas Government Code Chapter 2254.

<https://statutes.capitol.texas.gov/Docs/GV/htm/GV.2254.htm>.

Vendors are encouraged to bid any or all or any combination of the products or product categories listed above in their proposals.

HUB Subcontracting Plan (HSP)

Lynn Hodde, Director

HUB Program, Outreach and Training



Exhibit D - HUB Subcontracting Plan

ALL respondents must submit a completed HSP.

Exhibit D – HUB Subcontracting Plan

Exhibit D – HUB Subcontracting Plan

- DIR encourages all respondents to seek Historically Underutilized Business (HUB) subcontractors and maximize HUB participation in their bids.
- Responses submitted without a current HUB Subcontracting Plan (HSP) provided in the RFO, will **be disqualified per TAC Rule** §20.285
- All respondents, **HUBs and Non-HUBs**, are required to submit a completed HSP
- The HSP form includes specific instructions for meeting the Good Faith Effort requirements
- Vendors must complete a **new** HUB Plan and a good faith effort for this procurement



Exhibit D – HUB Subcontracting Plan

The HUB Goal for this RFO is 21.1%

- METHOD A (Attachment A) - If you are subcontracting and you are meeting or exceeding the HUB Goal for this RFO, you will complete Method A.
- Include all VID numbers for each vendor, all estimated dollar amounts and percentages for each vendor.



Exhibit D – HUB Subcontracting Plan

METHOD B (Attachment B) - If you are subcontracting, and are not going to meet the HUB Goal of 21.1% you will complete Method B.

- **Provide written notification** of subcontracting opportunity listed to at least three State of Texas certified HUBs
- **Provide written notification** of subcontracting opportunity to at least (2) minority or women's trade organization or development center
- Allow no less than seven (7) working days from their receipt of notice for HUBs to respond (keep delivery receipt emails).
- **Note:** Attach supporting documentation (letters, fax transmittals, email, etc.) demonstrating evidence of the good faith effort performed with RFO submittal



Exhibit D – HUB Subcontracting Plan

If not subcontracting, your response must contain a detailed explanation demonstrating HOW your company will fulfill the entire contract with its own resources

- Self-Performance Justification must be provided in the space provided in SECTION 3, do not reference sections in the RFO



HUB Subcontracting Plan

You may contact DIR's HUB Department for assistance in completing your HUB Subcontracting Plan (HSP) up to ten (10) working days before the RFO submittal.

Lynn Hodde

**Director, HUB Program, Outreach and Training
Texas Department of Information Resources**

lynn.hodde@dir.texas.gov
(512) 463-9813

DIR HUB Mailbox:
dir.hub@dir.Texas.gov

Exhibit E – Itemized Price Sheet & BidStamp VIS Price Form



Exhibit E Itemized Price Sheet & BidStamp VIS Price Form

- Itemized Pricing Sheet contains 4 Tabs:
(1) Instructions, (2) Products, (3) Services and (4) Volume Discounts.
- Enter prices for each item/service your company would like to offer to DIR customers within applicable Tab.
- Vendors must also submit pricing on DIR's Automated Pricing Form online in the BidStamp VIS for products. Do not enter Service line items.
- For certain products/services (COTS and those with user interfaces), VPAT/ACR documents must also be upload to the Price List Excel document. Also enter in the status for each product item. (See Instructions Tab for directions).
- Percentage Discounts for Products must be entered into BidStamp VIS price form.

Exhibit E - Itemized Pricing Sheet

Elements required for product pricing (Tab 2):

- Brand name
- Category/subcategory
- Functional Product Description
- Part Number
- MSRP/LIST Price
- Discount being offered
- DIR Customer Price

New!

- Upload applicable VPATS to Price Sheet
(See instructions Tab)
- Indicate Status of VPAT for all items.

$$\text{DIR Customer Price} = \text{MSRP} \times (1 - \text{DIR Discount}\%) \times (1 + 0.75\%)$$

(Calculation made by spreadsheet)

Exhibit E - Itemized Pricing Sheet (Continued...)

Elements required for services pricing (Tab 3):

- Name of service being provided
- Details/Description of Service
- List Cost
- Unit of Measure
- Discount being offered to DIR Customers
- DIR Customer Price

$$\text{DIR Customer Price} = \text{MSRP} \times (1 - \text{DIR Discount}\%) \times (1 + 0.75\%)$$

Contract for Product and Services Standard Terms and Conditions



Sample Contract/Standard Terms & Conditions

- **No exceptions** may be taken to certain terms as indicated on the Standard Terms and Conditions
- **Caution:** Respondent's Response may be disqualified if their exceptions are excessive, or if they list exceptions to non-negotiable terms.
- **Any exception must be listed in Exhibit A, Question 12.**



Electronic and Information Resources (EIR) Accessibility Forms

Elizabeth Cooper, Director
Technology Planning, Policy, and Governance

Exhibits G, H and I



EIR Accessibility Background

- Under Texas Government Code, Chapter 2054, Subchapter M, and DIR implementing rules, DIR's state agency and Institution of Higher Education Customers must procure EIR that complies with the accessibility standards defined in the Texas Administrative Codes [1 TAC 206](#), [1 TAC 213](#), and in the [Worldwide Web Consortium WCAG 2.0 AA](#) technical standard as applicable, and when such products or services are available in the commercial marketplace or when such products are developed in response to procurement solicitations.
- Accordingly, all vendors must provide accessibility documentation.



EIR Accessibility Required Document Types

- **Voluntary Product Accessibility Template (VPAT)**
 - Required for all COTS products (Software-as-a-Service (SaaS), contains ANY user interface
 - Referred to an Accessibility Conformance Report (ACR) once completed
- **Vendor Accessibility Development Services Information Request (VADSIR)**
 - Required for all vendors proposing Non-COTS and services
 - Includes web, application development, development services, configuration, integrated solutions, implementation, and more
- **Policy Driven Adoption for Accessibility (PDAA)**
 - Self-assessment of organizations accessibility maturity
 - Required for all responding vendor



Exhibit G: VPAT/ACR

- Required for commercial off the shelf (COTS) products and services documenting accessibility compliance to US Section 508 technical standards
 - ITIC VPAT 2.3 or higher template form must be used to created ACR
 - VPAT 1.0 forms are obsolete, will be accepted for unchanged products released on or before January 1, 2019
 - Completion instructions included in template; Instruction pages (1-9) should be deleted from the forms prior to submission
- Completed by individuals with relevant knowledge of the product accessibility.
 - VPATS are completed by manufacturer for products / product family specific
 - Resellers should obtain from manufacturer
 - Should be based on accessibility testing results and supported by documentation (on request)

Exhibit H: VADSIR

Vendors must complete Vendor Accessibility Development Services Information Request (VADSIR) if response includes one or more of the following offering types:

- Website development services
- Web Application Development Services
- Custom development services as part of an integrated solution.
- Client based software application development services
- Other software development services containing one or more user interfaces (end user, admin, etc.)

Exhibit I: PDAA

- Addresses the maturity of accessibility programs at the company level
 - Self-assessment - results mapped to the Policy Driven Adoption for Accessibility (PDAA) Maturity Model
 - Accessibility policy maturity provides insight into vendors' ability to develop accessible commercial off the shelf (COTS) and non-COTS offerings
- Vendors can use the results as a roadmap for implementing their organization-wide IT accessibility initiatives
 - Helps ensure that programs and processes are in place to facilitate the development of future accessible offerings.
 - Gaps in vendor internal governance systems and leadership commitment inhibit the ability to meet these standards for their products / services.



EIR Accessibility Resources

- **EIR Accessibility Website**

- <http://dir.texas.gov/View-Resources/Pages/Content.aspx?id=36>

- **VPAT template**

- <http://www.itic.org/public-policy/accessibility>

- **VADSIR template**

- <https://pubext.dir.texas.gov/portal/internal/resources/DocumentLibrary/Vendor%20Accessibility%20Dev%20Services%20Info%20Request.docx>

- **PDAA template**

- <https://pubext.dir.texas.gov/portal/internal/resources/DocumentLibrary/Accessibility%20Policy%20Driven%20Adoption%20Vendor%20Assessment.xlsx>

- **Additional Information**

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



Electronic and Information Resources (EIR) Accessibility

Questions

CONTACT:

Elizabeth Cooper, Director
Technology Planning, Policy, and Governance
Chief Technology Office
(512) 936-1125 | elizabeth.cooper@dir.texas.gov



General Information and Bid Submittal



General Information

- Reference the RFO page number and Section number when submitting questions.
- **Webinar participants may submit questions electronically at anytime during the webinar, please use the question tab.**
- Questions answered today are unofficial until posted on the ESBD in the form of an Addendum.
- Check the ESBD often for updates
- All questions regarding this RFO must be **submitted in writing through the BidStamp Vendor Information System Portal (VIS)** by **September 10, 2021, 5:00 P.M. (CT).**



General Information (cont'd)

- **Disqualification of Offers**

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

- **Delivery of Offers**

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



General Information (cont'd)

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



General Information (cont'd)

Contacts for inquiries regarding this RFO:

Pete Casals CTCD, CTCM – pete.casals@dir.texas.gov

Contacts for the following related topics:

Vendor Information Systems (VIS) Portal - BidStamp:

Stephanie Harrison CTCD, CTCM – stephanie.Harrison@dir.texas.gov

HUB Subcontracting Plan: Lynn Hodde – dir.hub@dir.texas.gov

Bid Submittal

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



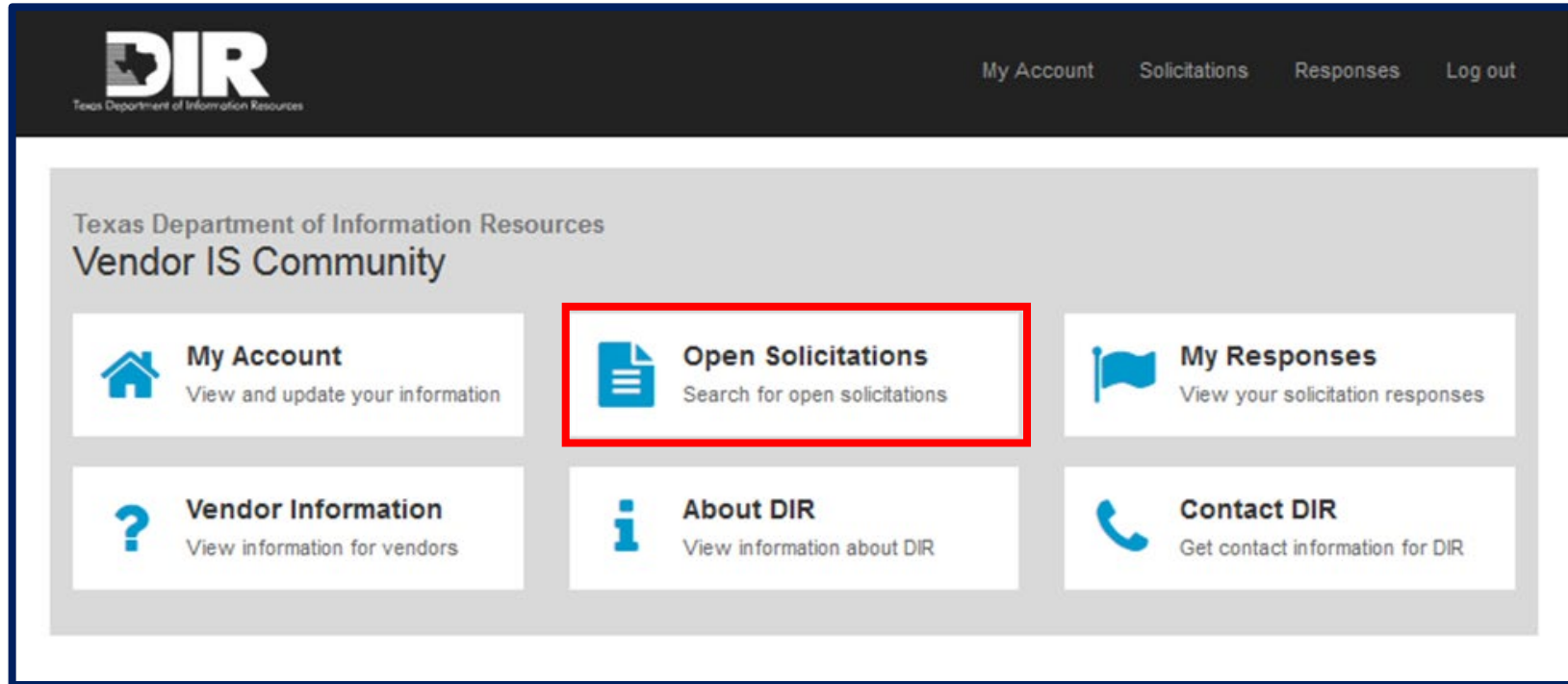
Bid Submittal

Persons with disabilities who seek accommodation, under the Americans with Disabilities Act (ADA), in responding to this solicitation may contact DIR at the point of contact in section 3.1 of this solicitation. Please allow at least five business days for response.



Responding to a Solicitation

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



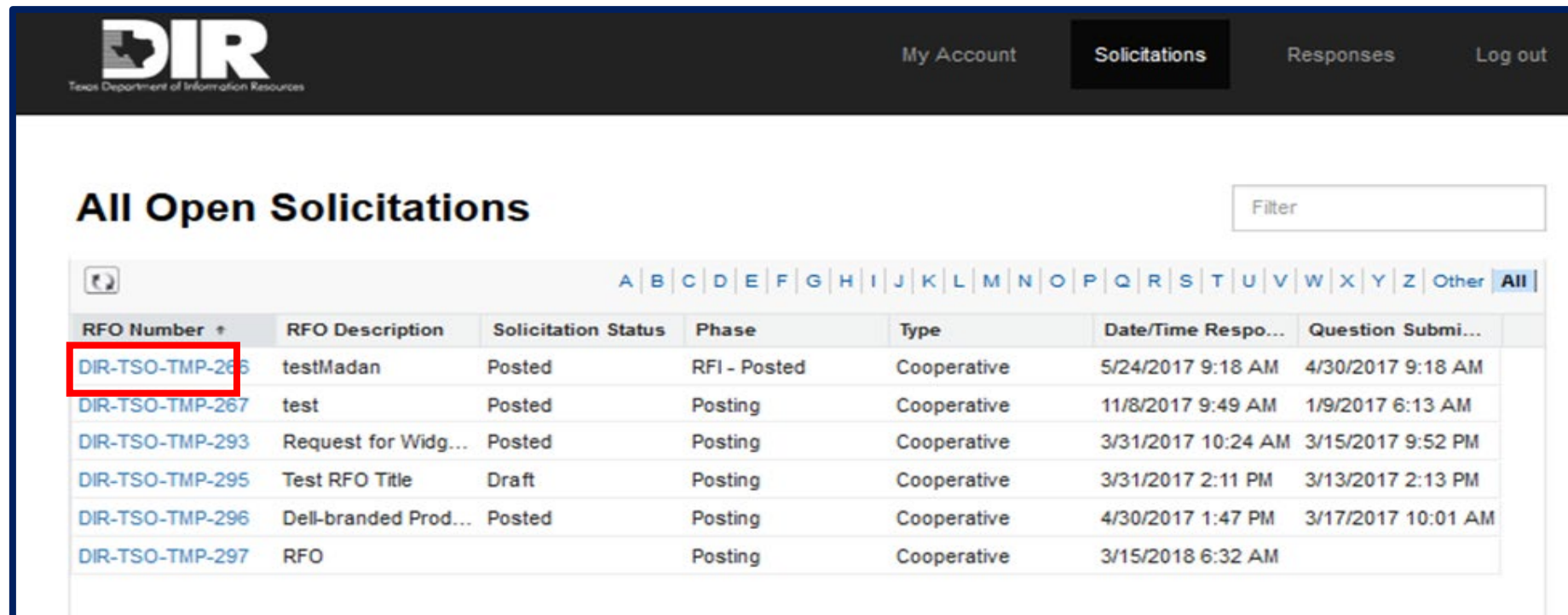
The Vendor BidStamp Guide and the presentation are posted on DIR's website on the Information For Vendors page.

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

Creating a New Response

To create a new response:

1. Log in to the VIS portal and select the "Open Solicitations" tile
2. Click on the "RFO Number" (**DIR-CPO-TMP-441**) of the solicitation you want to respond to
3. You will be navigated to the "RFO Number" detail page



The screenshot shows the DIR Texas Department of Information Resources portal. The top navigation bar includes 'My Account', 'Solicitations' (highlighted), 'Responses', and 'Log out'. The main heading is 'All Open Solicitations' with a 'Filter' button. Below the heading is a table of open solicitations. The first row, 'DIR-TSO-TMP-266', is highlighted with a red box. The table columns are: RFO Number, RFO Description, Solicitation Status, Phase, Type, Date/Time Respo..., and Question Submi....

RFO Number *	RFO Description	Solicitation Status	Phase	Type	Date/Time Respo...	Question Submi...
DIR-TSO-TMP-266	testMadan	Posted	RFI - Posted	Cooperative	5/24/2017 9:18 AM	4/30/2017 9:18 AM
DIR-TSO-TMP-267	test	Posted	Posting	Cooperative	11/8/2017 9:49 AM	1/9/2017 6:13 AM
DIR-TSO-TMP-293	Request for Widg...	Posted	Posting	Cooperative	3/31/2017 10:24 AM	3/15/2017 9:52 PM
DIR-TSO-TMP-295	Test RFO Title	Draft	Posting	Cooperative	3/31/2017 2:11 PM	3/13/2017 2:13 PM
DIR-TSO-TMP-296	Dell-branded Prod...	Posted	Posting	Cooperative	4/30/2017 1:47 PM	3/17/2017 10:01 AM
DIR-TSO-TMP-297	RFO		Posting	Cooperative	3/15/2018 6:32 AM	

Creating a New Response (cont'd)

DIR
Texas Department of Information Resources

My Account Solicitations Responses Log out

RFO Number
DIR-TSO-TMP-473

RFO Number Detail

Respond To Solicitation		Ask A Question		Subscribe to Solicitation		View Solicitation Documents	
Actual Start Date Posting	5/15/2017	Vendor Conference Date	5/25/2017 2:00 PM				
Question Submission Deadline Date	5/31/2017 2:00 PM	RFO Answers to Questions Deadline Date	6/7/2017 5:00 PM				
Date/Time Responses Due	6/15/2018 2:00 PM	Actual Start Date Evaluation	6/16/2017				

New Fields

Solicitation Status	Posted	Type	Cooperative
---------------------	--------	------	-------------

RFO Questions

No records to display

This page will display important deadlines for the solicitation and list any questions Vendor has submitted.

Buttons discussed on the next slide.



Creating a New Response (cont'd)

RFO Number Detail Button Description:

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

Respond to a Solicitation

DIR
Texas Department of Information Resources

My Account Solicitations Responses Log out

RFO Response
R0006029

i Add your documents below (400MB max size). Click the "Submit" button once all documents have been added.

i Please review the ESDB posting to ensure you have provided all the necessary documents in your submission. Also, please verify the information on the page is correct before submitting. Once submitting your response, you will be unable to make changes unless you withdraw your response completely and restart the submission process.

RFO Response Detail

RFO Number	DIR-TSO-TMP-478	Status	In Progress
Submission Date		Vendor	Tech Widgets, Inc. US
Submitted By		Actual Start Date Posting	5/15/2017
Vendor Conference Date	5/25/2017 2:00 PM	Question Submission Deadline Date	5/31/2017 2:00 PM
RFO Answers to Questions Deadline Date	6/7/2017 5:00 PM	Date/Time Responses Due	6/15/2018 2:00 PM
Actual Start Date Evaluation	6/16/2017		

RFO Response Documents

No records to display

i Reference forms are being sent via BidStamp as a courtesy. DIR will not be responsible if the form is not received by the vendor for any reason. It is solely the vendor's responsibility to ensure that the reference party receives the request.

Vendor References

No records to display

"RFO Response Page" buttons:

- **Delete:** Delete all information that has been uploaded and the response record before the response has been submitted. **Note:** Once the response is submitted, Vendor must use the **Withdraw** button that will appear upon solicitation submission.
- **Submit:** Submits the response record and all associated information. (*reference Vendor Guide Section 5.7*)
- **Ask A Question:** Questions can be submitted up until the "Question Submission Deadline date" indicated in the RFO document and on the detail page. (*reference Vendor Guide Section 5.6*)
- **Create Pricing Form:** Create a pricing form to submit pricing information for your response (*reference Vendor Guide Section 5.5*)
- **New (RFO Response Documents):** Upload required files indicated in the RFO posted on the ESDB (*reference Vendor Guide Section 5.2*)
- **New (Vendor References):** Submit a new reference's email address and opt to send the vendor a reference (*reference Vendor Guide Section 5.3*)

Mandatory Submissions

RFO Section 3.7.1 – Mandatory Response Contents

RESPONDENT MUST PROVIDE THE ITEMS LISTED BELOW OR THE RESPONSE WILL BE REJECTED.

- Exhibit A – Vendor Information **(SIGNED)**
- Exhibit A – **Canceled Contracts** – Attachment 1 (if applicable)
- Exhibit B – Vendor History and Experience
- Exhibit C – Contract Marketing and Support Plan
- Exhibit D – HUB Subcontracting Plan **(SIGNED)**
- Product and Services Pricing
- Vendor's service or licensing agreement, etc. (if any)
- EDGAR Certification Form
- Any addendum requirements – check the ESBD for these; Vendors do not receive notice



Questions

- Break (5 minutes)
- **Reference the Section Number and page number with your submitted question.**
- Questions answered today are unofficial until posted on the ESBD.
- Submit additional questions through BidStamp VIS.

Reminder

- Questions answered today are unofficial until posted on the Electronic State Business Daily (ESBD) in the form of an Addendum.
- Any changes or additional information regarding this RFO will be posted as an addendum to requisition number DIR-CPO-TMP-441 on the ESBD:
<http://esbd.cpa.state.tx.us/>
- It is the responsibility of Vendors to monitor the EBSD web site for addenda.



RFO Schedule

Section 3.3.1 Anticipated Schedule:

Date/Time	Activity
July 29, 2021	Publish RFO on Electronic State Business Daily
August 20, 2021 2:00pm (CT)	Optional Pre-Proposal Webinar
September 10, 2021 5pm (CT)	Estimated deadline for submitting questions
September 28, 2021 2:00 PM (CT)	Deadline for DIR to receive Vendor references Deadline for submitting responses to RFO
September 29, 2021 – until completed	Evaluation of responses, negotiations, and contract execution

Conference Closing

All questions, inquiries **must** be directed to:

Pete Casals

Email: pete.casals@dir.texas.gov

Thank You

dir.texas.gov
#DIRisIT
@TexasDIR



Texas Department of Information Resources

Transforming How
Texas Government
Serves Texans

Optional Vendor Conference Attendee List
Artificial Intelligence (AI) Products and Services RFO DIR-CPO-TMP-441
August 20, 2021

#	Name (Alphabetical)	Organization	Email	Is your company a Texas Certified HUB?	Is your company interested in partnering/being a subcontractor?
1	Aaron Fryzek	DataBank IMX	afryzek@atabankimx.com	No	Yes
2	Abe Garza	Southwest Research Institute	abe.garza@swri.org	No	Yes
3	Adam Eisenman	VIA	aeisenman@viascience.com	No	No
4	Alexander Miller	Accenture	alexander.j.miller@accenture.com	Yes	Yes
5	Allyson Boutote	SailPoint	allyson.boutote@sailpoint.com	No	No
6	Allyson Lynch	Capgemini America, Inc.	allyson.lynch@capgemini.com	No	No
7	Andrew Smetana	PMCS Services, Inc.	Smetana@PMCSservices.com	Yes	Yes
8	Aneeqa Ijaz	ThunderCat Technology, LLC	aijaz@thundercattech.com	Yes	Yes
9	Angela Canvot	Accenture	angela.canvot@accenture.com	Yes	Yes
10	Annapurna Adireddy	Infosys	annapurna.adireddy@infosys.com	Yes	Yes
11	Arek Skuza	Volta Venture	arek.skuza@voltaventure.co.uk	No	Yes
12	Ariana Ross	Dreamers Inc	ariana@thedreamers.us	No	Yes
13	Ashley Dixon	EMS	melissa.helvey@simulationiq.com	No	Yes
14	Avik Batra	Accenture	avik.batra@accenture.com	Yes	Yes
15	Becca Thompson	Accenture	rebecca.r.thompson@accenture.com	Yes	No
16	Becky Luedtke	AltaML Inc.	becky@altaml.com	No	Yes
17	Ben Archer	Automation Hero	ben.archer@automationhero.ai	No	Yes
18	BEn Keefe	Hyland Software	ben.keefe@hyland.com	Yes	No
19	Bijith Moopen	PriceSenz	bijith@pricesenz.com	Yes	Yes
20	Billy Haynes	TCS	Billy.Haynes@tcs.com	No	No
21	Bob Heilen	ManpowerGroup Public Sector	bob.heilen@manpowergroupsecure.com	No	Yes
22	Bob Minchew	Knight Security Systems	bminchew@knightsecurity.com	No	Yes
23	Brad Hastedt	TransPerfect	bhastedt@transperfect.com	Yes	Yes
24	Bratton Riley	Citibot	bratton@citibot.io	No	Yes
25	Brendan Clark	Hyland Software	brendan.clark@hyland.com	No	Yes
26	Brent Mears	NEC Corporation of America	brent.mears@necam.com	No	No
27	Brian Dietrich	Intel Corporation	BRIAN.DIETRICH@INTEL.COM	No	Yes
28	Brian Schlegel	DataBank IMX	bschlegel@atabankimx.com	No	Yes
29	Brianna Turner	Carahsoft	brianna.turner@carahsoft.com	Yes	Yes
30	Bryan Harter	Enterprise Applications Group, LLC	bryan.harter@gmail.com	No	Yes
31	Bryan VanGilder	MANPOWER INC	Bryan.VanGilder@mpgpublicsector.com	No	Yes
32	Cary Roberts	Casteel & Roberts	cary@casteelroberts.com	No	No
33	Casey McKinney	Onset Technologies	casey.mckinney@onsetech.com	Yes	Yes
34	Cathy DeWitt	Schlueter Group	cathy@schluetergroup.com	No	No
35	Chad Bell	Media Riders. Inc	amecom@mediariders.com	Yes	Yes
36	Chandra Yatagiri	NITCO INC	chandra@nitcoinc.com	Yes	Yes
37	Charlie Bauer	DataBank IMX	charlie.bauer@atabankimx.com	No	No
38	Cheryl Haynes	Enterprise Transformation	cheryl.haynes@capgemini.com	Yes	Yes
39	Chet Hayes	Vertosoft	chet@vertosoft.com	No	No
40	Cynthia Gibson	Capgemini	cyndi.gibson@capgemini.com	No	Yes
41	Dale Schermer	IBM	dscherme@us.ibm.com	Yes	Yes
42	Daniel Chiappe	Document Logistix	dan.chiappe@document-logistix.com	Yes	Yes
43	Danielle Holt	Half Associates, Inc.	dholt@half.com	No	No
44	Dave Ovesny	SYNNEX Corporation	daveo@synnex.com	No	No
45	Dave Worley	enChoice	dworley@enchoice.com	No	No
46	David Valentino	Venture raise	Dvalno1@gmail.com	No	Yes
47	Deb Rossi	Blue Prism	deb.rossi@blueprism.com	No	Yes
48	Dogukan Dogru	Half	dDogru@half.com	No	Yes
49	Dominic Hithon	Transperfect	dhithon@transperfect.com	No	Yes
50	Don Cenkci	Grant Thornton	don.cenkci@us.gt.com	Yes	No
51	Donna Holliday	OutriderZ	donna.holliday@outriderztx.com	No	No
52	Douglas Sharples	Egress	doug.sharples@egress.com	Yes	Yes
53	Dwayne Miller	enChoice	dmiller@enchoice.com	No	No
54	Elaine Ayo	elaine c ayo llc	ayollc@pm.me	No	Yes
55	Eli del Angel	Intel	eli.del.angel@intel.com	No	Yes
56	Eliot Eshelman	Microway, Inc.	eliote@microway.com	No	Yes
57	Ella Sileo	Software AG Government Solutions	ella.sileo@softwareaggov.com	No	Yes
58	Fatema Hopkins	SKAEL	fatema.hopkins@skael.com	No	Yes
59	Foram Patel	AT&T	fp5555@att.com	Yes	Yes
60	Francisco Rivera	The Syndicate Wave	frank.rivera@thesyndicategwave.com	No	Yes
61	Fred Hebert	Microway	fhebert@microway.com	No	Yes
62	Fred Seifu	AT&T	fs8510@att.com	No	Yes
63	Gary Massey	INFOSYS Public Services	gary.massey@infosys.com	No	No
64	Gaurav Sajwan	V3it Consulting, Inc.	gaurav.sajwan@v3it.com	No	Yes
65	Geoffrey Clark	Slalom	geoff.clark@slalom.com	No	Yes
66	George (tom) Hazelton	Intelliconnect, llc	tom.hazelton@intelliconnectllc.net	Yes	Yes
67	George Shemas	Saama Technologies Inc.	george.shemas@saama.com	No	Yes
68	Gerda Sessions	Agess, LLC	gerda.sessions@gmail.com	Yes	Yes
69	Glory Jeyapaul	Kainos Innovative Solutions Inc	gjeyapaul@kainosinnovative.com	No	Yes
70	Gopal Mishra	V3it Consulting, Inc.	gopal.mishra@v3it.com	No	No

Optional Vendor Conference Attendee List
Artificial Intelligence (AI) Products and Services RFO DIR-CPO-TMP-441
August 20, 2021

71	Guilherme Prevedello	MR	guilherme.prevedello@cinqtechnologies.com	No	Yes
72	Heather Trumpfheller	TEKsystems	htrumpfh@teksystems.com	No	Yes
73	Henry Sal	Computing System Innovations	henrysal@csissoft.com	Yes	Yes
74	Ian Wugalter	AltaML	ian@altaml.com	No	Yes
75	Ishani Pendse	ITHENA	ishanip@ithena.ai	No	Yes
76	Jack O'Connell	Google Cloud	jackoconnell@google.com	No	Yes
77	Jake Stine	AT&T	js059m@att.com	No	No
78	James Cotton Tolnay	DataBank IMX	jtolnay@databankimx.com	No	Yes
79	James Sexton	LEO Technologies, LLC	james.sexton@leotechnologies.com	No	No
80	Jared Fortenberry	DIR	jared.fortenberry@dir.texas.gov	No	No
81	Jay Yarbrow	Cambria Solutions, Inc.	jyarrow@cambriasolutions.com	No	Yes
82	Jeanette Garza	PTG	jeanette.garza@ptg.com	Yes	Yes
83	Jeff Heckler	The Schlueter Group	Jeff@schluetergroup.com	No	No
84	Jeffrey Dickert	Spruce Technology, Inc.	jdickert@sprucetech.com	No	Yes
85	Jessica De La Garza	Rackspace Government Solutions, Inc.	jessica.delagarza@rackspace.com	No	No
86	Joe Nanus Rackspace Technology	Rackspace Technology	Joe.Nanus@rackspace.com	No	Yes
87	Johanne Ibsen-Wolford	Genesys	johanne.ibsen@genesys.com	No	Yes
88	John Richardson	SALJRFive Investments	Jrichardson7007@gmail.com	No	Yes
89	John Schaefer	AT&T	js6591@att.com	Yes	Yes
90	Jonathan Lancey	iOLAP	jlancey@iolap.com	No	No
91	Jorge Szymanski	Ernst & Young, LLP	jorge.szymanski@ey.com	No	No
92	Jugna Shah	Esolvit	jugna@esolvit.com	Yes	Yes
93	Justin Korelc	iOLAP	jkorelc@iolap.com	No	No
94	Justin Nguyen	CGI	justin.j.nguyen@cgi.com	No	No
95	Karen Hansel	TEKsystems Global Services	khansel@teksystems.com	No	No
96	Khurram Qureshi	Fermat Software	khurram@fermatsoftware.com	Yes	Yes
97	Kindra Allen	Deloitte	kindraallen@deloitte.com	No	Yes
98	Kristina Branstetter	InterImage, Inc.	kbranstetter@iimage.com	No	Yes
99	Kurt Mayer	TechStar Group	kmayer@techstargroup.com	Yes	Yes
100	Kyle Petrosino	Cloudera	kpetrosino@cloudera.com	No	No
101	Lara Greenville Bode	Gradient AI	lara.bode@gradientai.com	No	Yes
102	Larry Davis	Aixora.ai	founder@aixora.com	Yes	Yes
103	Lauren Hunter	Half Associates, Inc.	lhunter@half.com	No	No
104	Leah Lovelady	LANSHORE LLC	dougerb@lanshore.com	Yes	Yes
105	Lee Harper	Catapult Systems LLC	lee.harper@catapultsystems.com	No	Yes
106	Leonardo Beltran	BEPC Incorporated	Leonardo.Beltran@becinc.com	Yes	Yes
107	Lindsay Kelling	Catapult Systems, LLC	lindsay.kelling@catapultsystems.com	No	Yes
108	Madhu Basu	PMCS	Basu@pmcsservices.com	Yes	Yes
109	Madison Brown	AT&T	Mb339d@att.com	No	Yes
110	Mahendra Kumar	PriceSenz LLC	mkumar@pricesenz.com	Yes	Yes
111	Manning Welty	TEKsystems	wwelty@teksystems.com	No	Yes
112	Marcus Montemayor	AT&T	marcus.montemayor@att.com	No	Yes
113	Marie Todd	Slalom	marie.todd@slalom.com	No	
114	Marissa Dever	Carahsoft Technology Corporation	marissa.dever@carahsoft.com	No	No
115	Mark Borchardt	iBridge Group, Inc.	mark.borchardt@ibridgegroup.com	Yes	Yes
116	Mark Sikora	enChoice	msikora@enchoice.com	No	Yes
117	Mary Vickery	Dept of Information Resources	mary.vickery@dir.texas.gov	No	No
118	Matt Stahl	Half Associates, Inc.	mstahl@half.com	No	Yes
119	Matthew Beath	LEO Technologies	matthew.beath@leotechnologies.com	No	No
120	Meg Hare	Accenture	meg.hare@accenture.com	No	No
121	Megan Harvey	ORock Technologies, Inc.	mharvey@orocktech.com	No	Yes
122	Melissa Proctor	Sas	melissa.proctor@sas.com	No	No
123	Michael Delner	Arrakis Consulting	mike@arrakisconsulting.com	Yes	Yes
124	Michael Milani	IBM	mrmilani@us.ibm.com	Yes	Yes
125	Michael Penney	TEKsystems Global Services	mpenney@teksystems.com	No	Yes
126	Michael Ratanasavetavadhana	Slalom Consulting	michaelr@slalom.com	No	Yes
127	Mike Cardwell	Slalom	mike.cardwell@slalom.com	No	Yes
128	Mike Donnelly	TransPerfect	mdonnelly@transperfect.com	No	Yes
129	Mike Pazuki	MCCI	mpazuki@mccinnovations.com	No	Yes
130	Mohnit Singh	Nagarro	mohnit.singh@nagarro.com	Yes	No
131	Nate Pavlot	Carahsoft Technology Corp	Nate.Pavlot@carahsoft.com	No	Yes
132	Navendu Charu	Slalom Consulting	navendu.charu@slalom.com	Yes	Yes
133	Nicole Giovanni	Reveal Group	nicole.giovanni@revealgroup.com	No	Yes
134	Nikky Shaffer	Novatio	nikky@novatiosolutions.com	No	Yes
135	Ning Wang	KPMG	ningwang1@kpmg.com	No	Yes
136	Nishant Khare	Infosys Limited	Nishant_Khare@infosys.com	Yes	Yes
137	P. Herrington	NITCO Inc.	nherrington@nitcoinc.com	Yes	Yes
138	Padma Duvvuri	Dragonfruit AI	padma@dragonfruit.ai	No	Yes
139	Paul Fisher	Iron Mountain	paul.fisher@ironmountain.com	Yes	Yes
140	Paul Gunter	Databricks	paul.gunter@databricks.com	Yes	Yes
141	Paul Kulkarni	Cognizant	prahlad.kulkarni@cognizant.com	Yes	Yes
142	Peter Rispoli	ai4Govt	peter@ai4govt.com	No	Yes
143	Prabhu Patil	PROLIM	prabhu.patil@prolim.com	Yes	Yes

Optional Vendor Conference Attendee List
Artificial Intelligence (AI) Products and Services RFO DIR-CPO-TMP-441
August 20, 2021

144	Prasad NS	Atos	s.prasad.n@atos.net	Yes	Yes
145	Prem Sagar Sundaram	Cognizant Technology Solutions	premsagar.s@cognizant.com	Yes	Yes
146	Raj Kiran	Esolvit Inc.	raj@esolvit.com	Yes	Yes
147	Renu Hall	Access Sciences Corporation	rhall@accesssciences.com	Yes	Yes
148	Reynaldo Trevino	Trevino Technical Services	reytexas@yahoo.com	Yes	Yes
149	Richard Wuest	EPMI	richard.wuest@epmi.com	No	Yes
150	Rick Collins	OnCore Consulting, LLC	rick.collins@oncorellc.com	No	Yes
151	Rick Makos	AltaML Inc.	rick.makos@altaml.com	No	Yes
152	Rishab Chaturvedi	AgreeYa Solutions, Inc.	rishab.chaturvedi@agreeya.com	No	No
153	Rob Farris	Slalom	farris.rob@slalom.com	No	No
154	Robert Downey	Deloitte	bdowney@deloitte.com	Yes	No
155	Robin Abbott	Atos	robin.abbott@atos.net	No	Yes
156	Roman Beketov	SoftElegance USA	rbeketov@softeleganceusa.com	No	Yes
157	Roxanne Adcock	Capgemini	roxanne.adcock@capgemini.com	No	No
158	Russ Savee	Iron Mountain	russ.savee@ironmountain.com	No	Yes
159	Ryan Denmark	RSDCGROUP	ryan.denmark@rsdc.com	No	Yes
160	Sam Myoung	Rackspace Technology	sam.myoung@rackspace.com	No	Yes
161	Sam Wertheimer	Hyperscience	sam.wertheimer@hyperscience.com	No	No
162	Samuel Lincoln III	SURELINC, LLC	smlincoln@surelinc.com	Yes	Yes
163	Sandeep Sinha	Insight	sandeep.sinha@insight.com	No	Yes
164	Sara lens Calderon	Tercera	sara@tercera.dev	Yes	Yes
165	Sarah Haddock	MCCI	shaddock@mccinnovations.com	No	
166	Saraswathi Singaravelu	techstar	Saraswathis@techstargroup.com	No	Yes
167	Scott & Wilson	Texas Department of Information Resources	scott.wilson@dir.texas.gov	No	No
168	Scott Hartman	TTEC Government Solutions, LLC	scott.hartman@ttec.com	No	Yes
169	Scott Sweitzer	Uptake	scott.sweitzer@uptake.com	No	Yes
170	Sharad Dayma	Synaptein Solutions Inc. (dba SynapOne)	sharad.d@synapone.com	No	Yes
171	Sharmila Tilwalli	IBM	sharmila.tilwalli@ibm.com	No	Yes
172	Shel Saripella	Onset Technologies LLC	shel.saripella@onsetech.com	No	Yes
173	Shelby Jackson	KPMG, LLP	shelbyjackson@kpmg.com	No	No
174	Shivani Lutchman	Avasant	shivani.lutchman@avasant.com	No	No
175	Shobhna Nihalani	TexcelVision - HUB Company	sales@texcelvision.com	Yes	Yes
176	Sonia Cardenas	AT&T	sc5467@att.com	No	No
177	Stephen Smith	SLALOM, LLC	stephen.smith@slalom.com	No	No
178	Steve Senterfit	Smartbridge, LLC	ssenterfit@smartbridge.com	Yes	Yes
179	Susanna Records	Lanshore LLC	susannagr@hotmail.com	No	No
180	Tarun Mehta	Avasant LLC	tarun.mehta@avasant.com	No	No
181	Taylor Alonso	Slalom	taylorlboyd@gmail.com	No	No
182	Terrance Bilbo	GT	tbilbo62@gmail.com	No	Yes
183	Thad Chappell	Winvale	tchappell@winvale.com	No	Yes
184	Thomas Tysdal	Xentity	ttysdal@xentity.com	No	Yes
185	Tim Anderson	LEO Technologies	tim.anderson@leotechnologies.com	No	No
186	Tim Lindstrom	Pegasystems	tim.lindstrom@pega.com	No	Yes
187	Todd Brown	Access Sciences Corporation	tbrown@accesssciences.com	Yes	Yes
188	Tom Black	Appian	tom.black@appian.com	No	Yes
189	Tommy Hodin	MagRabbit Inc	thodin@magrabbbit.com	Yes	Yes
190	Tracy Romero	DPS	tracy.romero@dps.texas.gov	No	No
191	travis harms	Dialpad	travis.harms@dialpad.com	Yes	Yes
192	Travis Jeanneret	IBM	travis.jeanneret@us.ibm.com	No	Yes
193	Trey Isaacks	AppDynamics, a Cisco company	trey.isaacks@appdynamics.com	No	Yes
194	Usha Boddapu	Esolvit Inc	usha@esolvit.com	Yes	Yes
195	Varun Panchal	ITHENA	Varunp@ithena.ai	No	Yes
196	Vivek Mehta	Weeve	vivek@weeve.ai	No	Yes
197	Wael Doukmak	Sology Solutions	wdoukmak@sologysolutions.com	Yes	Yes

END

Addendum 2

SOLICITATION NUMBER:	DIR-CPO-TMP-441
SOLICITATION NAME:	Artificial Intelligence (AI) Products and Services
ADDENDUM NUMBER:	2

Addendum Date: September 3, 2021

If you should have any questions regarding this Addendum, please contact:

Pete Casals
Department of Information Resources
300 W. 15th Street, Suite 1300
Austin, Texas 78701
Email: pete.casals@dir.texas.gov

Notice is given to Respondents desiring to submit a response to the above referenced solicitation that additional information is required:

This Addendum modifies the solicitation for Artificial Intelligence (AI) Products and Services, Solicitation No. DIR-CPO-TMP-441, released July 29, 2021. It informs the parties that:

It revises Section 3.7.1(a), provides corrected YouTube hyper-link to pre-bid conference video, and includes the answers to questions received prior to the due date and time published in the RFO.

In the submission of its response to this solicitation, Respondents shall submit this signed “page one” of the Addendum, acknowledging receipt of the Addendum.

Respondent Acknowledgment of Receipt

(printed entity name)

(printed name of authorized representative)

(signature of authorized representative)

(date)

Item 1:

Request for Offer, Section 3.7.1(a) is hereby deleted and replaced in its entirety with the following:

a) **Exhibit A Respondent Information**

This form must be filled out in its entirety and signed by an officer or agent empowered to contractually bind the Respondent. Respondent's Response should offer information to support its capability to provide the products and services required in this RFO. **Exhibit A, Attachment 1 must be completed and submitted with the Response if applicable per Item (xx), Canceled Contracts.**

Item 2:

While the text displayed the correct location of the pre-proposal conference video in Addendum 1, the hyper-link pointed to another RFO pre-proposal conference video other than DIR-CPO-TMP-441. The corrected hyper-linked address is provided below:

PRE-PROPOSAL CONFERENCE VIDEO

Video Link: <https://youtu.be/oErFHQkxnnY>

Item 3: Question and Answers

The following table outlines vendor questions, references Request for Offer (RFO) sections and page numbers, and the Department of Information Resources (DIR) response to questions (in sequence of questions received through email and BidStamp through August 28, 2021):

Question and Answer Document Posted September 3, 2021 as part of Addendum 2

#	RFO Section	Vendor Question	DIR Answer
1.	RFO Section 2 Scope	Is the Request for Offer (RFO) for Artificial Intelligence (A.I.) Products and Services including operationalizing data models or is it looking for algorithms in their specific domain outside of RPA?	The specific needs of the DIR Customer will determine the details of the RPA requirements. See RFO Section 1.3 Background.
2.	Exhibit B History and Experience	1. How much of a subcontractor's past performance can we include in the response? 2. How much weighting does past performance with the state have?	Proposals will be evaluated on the strength of the respondent's (prime) pricing, contract marketing and customer support plan, and experience. See Section 4.2.2 Weighted Evaluation Criteria. Respondent's Experience will make up 30% of their total score.

#	RFO Section	Vendor Question	DIR Answer
3.	Exhibit E Itemized Price Sheet - Services Worksheet	For providing the Services pricing, are you expecting us to provide consulting hourly rates for the typical roles on these projects? Or are you wanting "prices" for a whole project? Prices for a whole project may be difficult to provide since they vary based on things such as the overall scope of the effort, the amount of data that has to be cleansed/integrated/harmonized (before AI algorithms can be applied), the quality of data, the level of accuracy expected etc. Perhaps we could provide Cost ranges - high and low - for what we have seen for these types of projects in the past. Please provide some guidance on this.	Services typically are outlined by resource description and their hourly rates.
4.	Exhibit J Reference Form	Are only 3 references required for the response? Or are 3 references required per category? Please confirm.	We request three (3) references total. After the third reference is received, no others will be considered.
5.	Exhibit G VPAT	If we are a services only firm, we do not have to submit Exhibit G, is that correct? How do we indicate that we are services only and will not submit an Exhibit G, so as to remain compliant with required response documents?	See Section 2.5.1 EIR Form Applicability Letter (a) and (b) that provides details on the applicability of Exhibit G to specifically COTS product offerings only and Exhibit H to specifically development services only. Section 2.5.2 and 2.5.3 indicates that Vendors not providing ACRs or VADSIRs, respectively, must attest that the documentation does not apply to their product offerings in Item 13 of Exhibit A Respondent Information.

#	RFO Section	Vendor Question	DIR Answer
6.	Exhibit F - EDGAR Certification Form	Is this form required to be submitted with our response? Or submitted at the time that we will contract with an educational institution for services? (Per RFO instructions in 3.5.2E 'In such cases, upon request from eligible Customer, Respondent must complete EDGAR')	Please provide Exhibit F – EDGAR Certification Form with your response. You may also provide a copy of the same form upon request from eligible DIR customers.
7.	Exhibit B History and Experience	Beyond the 2 page narrative of Respondent History; there is no requirement for narrative description of a vendors experience or methods. Are the client references the primary method of verifying experience? If we were to include narrative within the history and experience section, would that be beneficial to the reviewers?	The respondent's experience should be outlined in the 2-page limit narrative of Exhibit B. The reviewers will also take into account reference materials as supplemental to what's outlined in Exhibit B.
8.	RFO 3.5.1B	The RFO State: "Respondents to this RFO must propose to make sales to Customers in one (1) of the following ways: i. Respondent will sell directly to Customers through a Co-op Contract. ii. Respondent will execute a Co-op Contract with DIR and designate one (1) or more qualified dealers or resellers to sell directly to Customers on its behalf. Respondent may also sell directly to Customers." Are services (only) providers able to respond to this solicitation? Or only software/hardware providers?	Services are also allowable as described by the RFO's tile Cybersecurity Products and Services. See also Scope Overview Section 2.1.1 (a) "...products and services."

#	RFO Section	Vendor Question	DIR Answer
9.	Overall Response	Please confirm the requested naming convention for all required response components	When uploading documents to BidStamp, please upload as separate files using brief and descriptive names. Use of special characters, such as !#\$*, may create technical system errors when attempting to upload the documents.
10.	Exhibit F - EDGAR Certification Form	Does the CIQ form need to be completed and submitted as part of the response? Or is that completed when an SOW is signed with a DIR customer?	See Question 6.
11.	Exhibit B History and Experience	If one client experience fits into more than 1 of the 6 AI categories outlined in this RFO - should we just list it as part of 1 of the categories, or is it ok to list it as part of multiple?	The client's experience may be described being relevant to multiple categories if that is the case.
12.	Overall Response	Will a transmittal letter and executive summary be reviewed as part of the scoring process?	Neither the transmittal letter nor the executive summary will be considered in the scoring process.
13.	RFO Section 3.4.1 HUB Subcontracting Plan	It states "ALL RESPONDENTS RESPONDING TO THIS RFO, INCLUDING THOSE THAT ARE HUB CERTIFIED OR THOSE WHO DO NOT PLAN TO SUBCONTRACT, MUST COMPLETE A HUB SUBCONTRACTING PLAN (HSP) IN ACCORDANCE WITH THE STATE'S POLICY ON UTILIZATION OF HUBS. " If the Successful Respondent does not plan to subcontract, Successful Respondent must state that fact in their plan. Is use of HUBs required?	If respondent intends to Self-Perform they would explain how they intend to Self-Perform in Section 3 of the HUB Subcontracting Plan (HSP)
14.	Exhibit B History and Experience	Question 6 asks for Texas Authorized Consortia. Can you provide a list of Texas authorized consortia, that we can verify our participation in?	Some examples of such consortia are NASPO, TIPS, OMNIA, and GSA.
15.	Exhibit J Reference Form	Can we use the same reference for multiple categories or do we need 3 unique references per each category?	Only three (3) references total will be considered.

#	RFO Section	Vendor Question	DIR Answer
16.	Exhibit J Reference Form	There is nothing that specifies which category the references are sending them in for. Where should this be specified?	References are not intended to be category specific. No more than three (3) references will be considered.
17.	All sections requiring signature	Does each document in the submission package have to be signed by the same signatory? Or can different individuals sign documents, so long as they are all executive representatives?	Signatures may be by multiple representatives, but they must be authorized by the company to contractually bind the company.
18.	Exhibit J Reference Form	For question 4, are you looking for responses in Texas only or countrywide?	There are no geographical limitations to the reference's location.
19.	Exhibit A	For question 16 Proof of Financial Stability, is there a document we need to provide or an action we need to take or will the Comptroller of Public Accounts research this on their own?	To receive an award through this solicitation, respondents will need to be registered with the Comptroller of Public Accounts Franchise Tax office and be in good standing. To confirm registration and status visit https://mycpa.cpa.state.tx.us/coa/search.do
20.	Exhibit J Reference Form	If we have a reference that is willing to submit the reference form on our behalf but they would like their response to be confidential and their name to not be used publicly, how do we go about this? Are all references that are submitted considered private therefore not shared unless it is in our formal response?	See RFO Section 3.11. Public Information. DIR is a government agency subject to the Texas Public Information Act. Responses submitted to DIR as a result of this RFO are subject to release as public information after contracts are executed or if the procurement is terminated.

#	RFO Section	Vendor Question	DIR Answer
21.	Exhibit C Contract Marketing Customer Support Plan	<p>Exhibit C asks for "Provide a sample of a Service Level Agreement (SLA) between you and DIR for DIR Customers containing the following by not limited to:</p> <p>a) Reporting to be provided to DIR and when; b) On-boarding times; c) Order Tracking communications; and d) Follow-up process and timeline."</p> <p>Can this service level agreement be in addition to the 10 page limit? This means questions 1-7 in Exhibit C would be up to 10 pages, and the SLA sample would go beyond.</p>	The 10-page limit does not apply to the SLA sample.
22.	Transmittal Letter and Executive Summary, Exhibit B, Exhibit C	<p>These sections have page limits. Do title page and table of contents count in the page limit? Or are these excluded?</p>	Title pages and table of contents do not count towards the page limits.
23.	RFO Section 3.7.1.(a)	<p>3.7.1a) Exhibit A Respondent Information it says to fill out Attachments 1 and 2 "if applicable". However, Attachment 1 is a Sample Contract and Attachment 2 are the Standard Terms and Conditions. What items would be filled out in those attachments?</p>	See Item 1 of this Addendum 2 that amends RFO Section 3.7.1(a).

#	RFO Section	Vendor Question	DIR Answer
24.	RFO Section 3.5.5.	Section 3.5.5 Cybersecurity Training calls out that the cybersecurity training program must be certified under Section 2054.519, Texas Government Code. Can our (vendor) employees make use of the client's certified cybersecurity training programs as they onboard with the client? Or is it expected that the vendor provide this training internally? Or through a third-party provider? Or from DIR?	More information on required cybersecurity training can be found at https://dir.texas.gov/View-About-DIR/Information-Security/Pages/Content.aspx?id=154 or by sending an email to TXTrainingCert@dir.texas.gov.
25.	Exhibit B History and Experience	For questions 2,3,&4 many of our projects span across several of these disciplines and we do not recognize sales against these same naming conventions. Can we provide our expertise for these combined disciplines or do we have to break out our answers for each of the six categories?	You may provide your history and experience for any one or combination of the disciplines outlined in scope section. It is not necessary to break out answers based on the categories.
26.	RFO Section 2 Scope	Hoping you can confirm if the Texas Dire – AI RFP is an OEM RFP, not a systems integrator RFP.	Both OEMs and system integrators are welcomed to respond to this RFO.
27.	RFO Section: 3.7.2 References, Page: 22,	Can we include past performance references from our subcontractor teammates?	References should be received from companies or government agencies that were clients that received products or services from the respondent.
28.	RFO Section: 3.7.2 References, Page: 22,	Is it acceptable if the references cover some of the services listed in the RFO (AI, Machine Learning, Robotic Process Automation (RPA), Natural Language Processing (NLP), Computer Vision (CV) and Digital Assistant products) but not all the services?	Yes, it is acceptable that any of the references may cover any one (1) or all or any combination of the categories listed in the areas of AI, Machine Learning (ML), Robotic Process Automation (RPA), Natural Language Processing (NLP), Computer Vision (CV) and Digital Assistants (DA) products or services.

#	RFO Section	Vendor Question	DIR Answer
29.	RFO Section: Transmittal Letter and Executive Summary, Page: NA,	For the purpose of response, can we have transmittal letter and executive summary as separate documents?	Yes, the required transmittal letter and executive summary may be uploaded to BidStamp as separate documents.
30.	RFO Section: General, Page: NA,	The resources who will be undertaking the scope of work for DIR customers- Are they required to be working Onsite or would a hybrid structuring of resources be acceptable(outside of North America via remote correction)?	DIR Customer will provide final determination of onsite/offsite requirements based on their specific needs for the mission.
31.	RFO Section: 1.3.4 Cost Recovery, Page: 5,	"The administrative fee must be included in the Successful Respondent's price to the Customer and paid to DIR by the Successful Respondent. " - We are assuming that this fee need to be included in the price sheet to be submitted?	The Excel spreadsheet (Exhibit E) will automatically make the calculation of the DIR customer price based on the respondent's entries of MSRP/List price and discount percentage off. The calculation will be... DIR Customer Price = MSRP x (1-DIR Discount%) x (1+0.75%).
32.	RFO Section: 3.7.1 Mandatory Response Contents, Page: 23,	Will the price submitted in Exhibit E be binding or would we have further optimization while doing contract with DIR customers?	Vendors would be able to offer further discounts while doing business with DIR customers. Additional, additional discounts like aggregate and volume discounts can be negotiated with the DIR customer at the time of purchase.

#	RFO Section	Vendor Question	DIR Answer
33.	RFO Section: 2.5.2 VPAT Submission and Review – COTS Offerings, Page: 13	"Vendor submissions with missing accessibility documentation or blatantly misrepresented documentation will result in disqualification." In the same section it is mentioned that if the products are exempted from such testing can mention in "Notes" located in the product information section of the VPAT v.2.3 or higher, or as an additional note in the product information section of older VPAT versions of the form, specifying each exempt product or product family with a supporting statement(s) for this position. V"- Please clarify on what is the actual criteria for exemption	<p>DIR requires vendors proposing Commercial Off the Shelf (COTS) products, including Software as a Service (SAAS), to provide Accessibility Conformance Reports (ACR) created by using a VPAT.</p> <p>If the proposal includes software, hardware, or services that have a user interface for access by the public or employees of state agencies and institutions of higher education then a VPAT is required to be submitted with the response to RFO.</p> <p>Resellers must obtain ACRs from the manufacturer or provide links to the manufacturer's accessibility documentation.</p> <p>Vendors claiming that a proposed product or family of products is exempt from accessibility requirements must specify the product(s) as such in "Notes" for exempt product or product family with a supporting statement(s) for this position.</p> <p>Texas Government Code, Chapter 2054, Subchapter M requires state agencies and institutions of higher education to procure EIR that complies with the accessibility standards defined in the Texas Administrative Codes 1 TAC 206, 1 TAC 213, and in the Worldwide Web Consortium WCAG 2.0 AA technical standard as applicable.</p>
34.	RFO Section: 3.7.2 References, Page: 22, Question:	Can the respondent contact be CC'ed in the email that the reference contact would send to DIR?	Yes. The respondent can be cc'd when the reference is sending their reference form (Exhibit J) to DIR.

#	RFO Section	Vendor Question	DIR Answer
35.	RFO Section: 2.5.3 VADSIR Submission and Review – non-COTS Offering, Page: 12, Question:	We understand that VADSIR is required to demonstrate vendor ability to produce accessible electronic and information resources at an organization level and is not dependent on the type of services/products offered. Please confirm our understanding.	VADSIR are applicable to specifically one or more of the development services outlined in Section 2.5.3.
36.	RFO Section: 2.5.4 PDAA Submission and Self-Assessment Score – All Offerings, Page: 12, Question:	We understand that PDAA is required to demonstrate vendor ability to produce accessible electronic and information resources at an organization level and is not dependent on the type of services/products offered. Please confirm our understanding.	Yes, a PDAA is required to be submitted by all respondents in addition to any applicable ACR/VPAT or VASDIR.
37.	RFO Section 2.1.4	Robotic Process Automation (RPA) In an effort to minimize inconvenience for reference clients, would DIR consider allowing references that have previously been submitted for DBITS to be used for this RFO?	Yes, but the reference must use the Exhibit J Reference Form that was included with this RFO AI Product and Services DIR-CPO-TMP-441. They may not submit the same form submitted for another RFO and will need to submit a new one.
38.	RFO 2.3. Emerging Technologies page 10,	DIR reserves the right to consider the addition of services to support emerging technology such as next generation, enhancements and upgrades for products or services that are within the scope of DIR-CPO-TMP-441. Successful Respondent may propose such service categories throughout the term of the Contract. What is the process for proposing added services to support emerging technology and enhancements/upgrades to this DIR contract after award?	Successful respondents should contact their assigned DIR Contract Manager to request consideration if their proposed next generation products or services are within scope of the RFO. The DIR Contract Manager will then process the request for consideration.

#	RFO Section	Vendor Question	DIR Answer
39.	RFO 1.4.3 BidStamp/VIS Price Form instructions page 5 (mandatory requirement when offering brand products), a.	Is the Respondent required to complete both the pricing form in BidStamp and submit Exhibit E, itemized price sheet if the Respondent is offering both software and services? b. If yes, please confirm the Respondent should complete the BidStamp pricing form for software products only.	The respondent should complete the BidStamp pricing form for software products only, not stand-alone services.
40.	RFO 3.7.1. d) page 21	Sample HUB Subcontracting Plan NOTE: For the purposes of the HUB Subcontracting Plan, Order Fulfillers designated by a manufacturer or publisher to sell directly to Customers on its behalf are considered subcontractors. Please define "Order Fulfillers" in this context? Would an authorized reseller be considered an "Order Fulfiller?"	Yes
41.	RFO 3.7.1. d) page 21	Sample HUB Subcontracting Plan. Does a HUB need to be a direct subcontractor or can a HUB be a subcontractor to a subcontractor? If the latter, how many levels of subcontracting are permitted?	A respondent would only identify the first-tier subcontracting on their HUB Subcontracting Plan (HSP)
42.	RFO Section 3.7.2. Page 22	References: Respondent may submit the Exhibit J Reference Form to companies or government agencies through the BidStamp VIS. AND Bid Stamp Vendor References: Reference forms are being sent via BidStamp as a courtesy. Please confirm sending reference forms through BidStamp is not required. Please confirm the Vendor References section in BidStamp would not need to be completed when submitting a response if the Respondent is not sending reference forms through BidStamp.	Respondents may have the Reference Form (Exhibit J) forwarded to their references either through BidStamp or by providing the Reference Form (Exhibit J) directly to their reference via email. It is not required that the respondent use BidStamp to forward the form to their references.

#	RFO Section	Vendor Question	DIR Answer
43.	Exhibit E, itemized price sheet:	Regarding services pricing, does DIR prefer to receive 1) hourly rates, 2) a base service package that would be customized based on the software selected and the agency procuring the solution, or 3) both?	Either are acceptable, but the respondent should note that the base of DIR customers varies across a wide range of channels and the purchasers' needs will vary greatly. Stand-alone services are typically outlined using resource description and hourly rate.
44.	EXHIBIT J - REFERENCE FORM	In this form, the VENDOR Quality of Artificial Intelligence (A.I.) Products and Services asks: 1. Have you purchased any Artificial Intelligence (AI) Products and Services from this Vendor in the past 2 years? Yes____ No____ QUESTION: If the reference selects 'No' in the appropriate box will this information disqualify the vendor?	No, the Reference Form (Exhibit J) is not a pass/fail item and will only be used to take into consideration the respondent's history and experience in providing the products and services outlined in the RFO's Section 2 - Scope.
45.	EXHIBIT J - REFERENCE FORM	Halff requests clarification on the Reference forms being sent via BidStamp as a courtesy - must we submit our reference parties names and contact information through BidStamp, or can we send the form ourselves to our references (as long as they respond directly to DIR with their responses)? If DIR has to be the one sending the forms, is there a deadline when our references names must be submitted by? And when when the forms be sent to the references?	The Reference Form may be sent to your reference either through BidStamp or by emailing the form to the reference directly. The respondent is the one providing their reference the form.
46.	EXHIBIT J - REFERENCE FORM	Can our references be from Oklahoma?	There are no geographical limitations placed on the reference's location.
47.	GENERAL	Should our final submittal be one pdf? Or should each "mandatory response content" item from the checklist be uploaded a separate pdf, word or excel file (whichever is applicable)? [Checklist is on page 5, Exhibit A, no. 17]	Uploading separate files are preferred.

#	RFO Section	Vendor Question	DIR Answer
48.	GENERAL	Should the Letter of Transmittal and the Executive Summary listed in the checklist be two separate documents? Are there any page limitations or specifications for these requirements? [Checklist on page 5, Exhibit A, no. 17]	The letter of transmittal and executive summary may be separate documents. The page for the two items is 1 page each.

END

ADDENDUM 3

SOLICITATION NUMBER:	DIR-CPO-TMP-441
SOLICITATION NAME:	Artificial Intelligence (AI) Products and Services
ADDENDUM NUMBER:	3

Addendum Date: September 16, 2021

If you should have any questions regarding this Addendum, please contact:

Pete Casals
Department of Information Resources
300 W. 15th Street, Suite 1300
Austin, Texas 78701
Email: pete.casals@dir.texas.gov

Notice is given to Respondents desiring to submit a response to the above referenced solicitation that additional information is required:

This Addendum modifies the solicitation for Artificial Intelligence (AI) Products and Services, Solicitation No. DIR-CPO-TMP-441, released July 29, 2021. It informs the parties that:

It revises Exhibit E – Itemized Price Sheet, revises Attachment 1 Sample Contract, revises Attachment 2 Standard Terms and Conditions, revises RFO Section 3.3.1 Schedule, and includes the answers to questions received prior to the due date and time published in the RFO.

In the submission of its response to this solicitation, Respondents shall submit this signed “page one” of the Addendum, acknowledging receipt of the Addendum.

Respondent Acknowledgment of Receipt

(printed entity name)

(printed name of authorized representative)

(signature of authorized representative)

(date)

Item 1:

Exhibit E- Itemized Price Sheet has been replaced in its entirety with the attached document, Exhibit E- Itemized Price Sheet Ver2. The only changes to the spreadsheet is that Tab 2 Column L "Average Brand Discount" has been deleted and a sample has been added to the Services tab. For instructions on how to enter product (software brands) information into BidStamp price form, see RFO Section 1.4.3 BidStamp/VIS Price Form.

Note: If the respondent has already completed Exhibit E from the initial packet, they may also simply delete the above-mentioned column before submitting the document.

Item 2:

Attachment 1 Sample Contract has been replaced in its entirety with the attached document, Attachment 1 Sample Contract Ver2.

Item 3:

Attachment 2 Standard Terms and Conditions has been replaced in its entirety with the attached document, Attachment 2 Standard Terms and Conditions Ver2.

Item 4:

RFO Section 3.3.1 RFO Schedule has been replaced in its entirety with the following:

3.3.1 RFO Schedule

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

Table 1: Tentative Schedule of Events

Date/Time	Activity
July 29, 2021	Publish RFO on Electronic State Business Daily (ESBD)
August 20, 2021 2:00pm (CT)	Optional Vendor Conference
September 10, 2021 5pm (CT)	Deadline for submitting questions
October 19, 2021 2:00 PM (CT)	Deadline for submitting responses to RFO Deadline for DIR to receive Vendor references
October 20, 2021 – until completed	Evaluation of responses, negotiation, and contract execution

Item 5:

The following table outlines vendor questions, references Request for Offer (RFO) sections and the Department of Information Resources (DIR) response to questions received during the Optional Pre-bid Conference held on August 20, 2021:

Question and Answer Document
Posted September 16, 2021 as part of Addendum 3

#	RFO Section	Vendor Question	DIR Answer
1.	1.3.5 Historical Sales	What % of cooperative contracts historical sales can be related to AI services?	DIR does not have historical sales regarding AI Products and Services.
2.	Attachment 1 Standard Contract Terms and Conditions	Do we need to submit a red-lined version of Attachment 1 (Standard Contract Terms and Conditions) if we have no exceptions to request?	No. If there are no exceptions taken, then a redlined version of Attachment 1 Standard Terms and Conditions is not applicable.
3.	Exhibit A Respondent Information	There is no question in the Information template where we can talk about products and services. Where should we provide content on products and services ?	Respondents should utilize the appropriate sections of Exhibit B History and Experience or Exhibit C Contract Marketing and Support Plan
4.	Exhibit B History and Experience	Is there any limit on number of pages for History and Experience section?	In no more than two (2) pages, provide a detailed history of your company. There are no other limits to the remainder of the questions.
5.	Exhibit B History and Experience	Exhibit B - is there a page limit for this requirement?? In previous RFO there have been restrictions.	See answer to Question 4.
6.	Exhibit B History and Experience	Kindly let us know where do we showcase our AI experience and capabilities? It seems like Attachment B doesn't have a space for capabilities.	Please use Exhibit B Question 1 to showcase your AI company's history and experience in providing AI capabilities. DIR may make changes to this form through the issuance in a future addendum.
7.	Exhibit B History and Experience	Are there any page limitations on our experience and capabilities descriptions in Exhibit B?	There is a 2-page limit for the description of your company's history/experience (Exhibit B - Question 1).

#	RFO Section	Vendor Question	DIR Answer
8.	Exhibit B History and Experience	I'm with a software vendor, who will leverage a distributor to submit on this. Should the history of performance represent the software vendor or the submitting distributor?	The Exhibit B History and Experience should represent the respondent's history and experience, not the distributor or manufacturer they represent.
9.	Exhibit E Itemized Price Sheet	Is a labor rate card acceptable for services pricing?	Services must be entered into Exhibit E Itemized Price Sheet, Tab 3
10.	Exhibit E Itemized Price Sheet	Should services be limited to the products we list in the products sheet?	Respondents may provide "related services" (product training, installation, warranty, and maintenance) as well as "stand alone services" that are not tied to a specific software product.
11.	Exhibit E Itemized Price Sheet	Where do we put information about price increases over the life of this?	The DIR contract would tie the Successful Respondent to the discount percentage offered. Changes to MSRP/list prices may be managed throughout the life of the contract by working with the assigned DIR contract manager.
12.	Exhibit E Itemized Price Sheet	Can the price be provided as a range?	No.
13.	Exhibit E Itemized Price Sheet	Can DIR clarify if they have a List of services that can be filled in the Exhibit E Itemized Pricing Sheet Tab 3 Services	Respondent should use outline the services being proposed in Tab 3 of Exhibit E Itemized Pricing Sheet.
14.	Exhibit E Itemized Price Sheet	For a Category if we mention the service to be provided as implementation how do we provide the rate for it. Please clarify?	Services can be outlined in the itemized pricing sheet using categories, sub-category, and resource descriptions and their associated hourly rates.
15.	Exhibit E Itemized Price Sheet	Exhibit E Itemized Pricing Sheet Tab 3 Services seems more suitable for product not service. Can DIR Clarify if it is a mistake or Not? If Not, can you provide a sample of how to fill it	See answer to question 14.

#	RFO Section	Vendor Question	DIR Answer
16.	Exhibit E Itemized Price Sheet	Will awards allow for "fixed price" services vs. Time and Materials hourly pricing?	Fixed unit pricing or labor rates are acceptable. For labor rates, provide clear descriptions of the resource and their hourly rate. If fixed unit pricing is used, provide a clear description of the function being provide within the unit and the unit price.
17.	Exhibit E Itemized Price Sheet	Can you elaborate on pricing - is this time and materials, deliverables based, etc?	Enter pricing information in the Exhibit E Itemized Price Sheet. See Tab 1 - Instructions.
18.	Exhibit E Itemized Price Sheet	If we have several parts (hundreds) from a specific software brand, can we just provide a discount per brand instead of a price for each individual part?	The Exhibit E Itemized Price Sheet will need to include each and every item the respondent would like to offer to DIR Customers.
19.	General	Are you looking for respondents to?: 1. Define "model building/development", as an example, with definitions of complexity, model types, data collection and data preparation work needed etc., and then arrive at a base price that is then provided to you, or 2. Provide rates/hr for different skill sets at different levels of experience, since these solutions will not have fixed, universally understood defintions.	Since the specific needs will be determined by the DIR Customer, providing resource descriptions along with hourly rates is typical for vendors outlining their service offerings.
20.	General	Will these slides be available after the webinar?	Yes, they can be found within Addendum 1 on the Electronic State Business Daily (ESBD).
21.	General	Will you release ansewers to questions on a daily bases or will you release them all at once.	DIR intends to release answers to questions weekly through addendums posted to ESBD.

#	RFO Section	Vendor Question	DIR Answer
22.	General	Is there any legacy data regarding the current uses of AI, Machine Learning, RPA, NLP, and CV?	Some examples of organizations providing data on this emerging technology includes the National Artificial Intelligence Initiative, (www.ai.gov), U.S. Government Accountability Office (GAO) (https://www.gao.gov/products/gao-21-519sp), and DIR AI Center of Excellence. (https://dir.texas.gov/enterprise-solution-services/artificial-intelligence-ai-center-excellence)
23.	General	Has State of TX identified some of the AI Projects / Use cases that need to be addressed in near future? - TexcelVision	See answer to questions 22 & 31.
24.	General	Another question: Do you require products to be Fed Ramp certified?	All applicable federal, state, and local laws and regulations apply. While DIR does not universally require FedRamp certification for all products, requirements may vary by Customer.
25.	General	Will you accept additional attachments that describe our products and services?	No. Please use the forms provided to describe your products and services.
26.	General	Can we bid as a prime and also as subs under other primes?	Yes.
27.	General	Is there a way to test/confirm that DIR can see an electronic signature?	No. Such capability does not exist at this time.
28.	General	Could we submit a different document for Executive summary?	Yes. The executive summary is limited to one (1) page.
29.	General	Do you have to be a Texas based company to submit a proposal?	No, but your company must be registered with the Texas Comptroller of Public Account's Franchise Tax office at the time of award. https://comptroller.texas.gov/taxes/franchise/
30.	General	Can we get a list of attendees from this RFO meeting?	The list of attendees of the optional pre-bid conference can be found in Addendum 1 posted to the ESBD.
31.	General	What projects, if any, are currently underway that would normally be considered under this contract?	See RFO Section 1.3 Background. Successful Respondent will work directly with DIR customers to determine customer needs.

#	RFO Section	Vendor Question	DIR Answer
32.	General	Will you be providing a list of attendees?	See answer to question 30.
33.	General	Can DIR clarify the difference between a Commodity contract and a Professional Services contract?	See Texas Govt Code Chapter 2155 for the State's definitions of goods and services: https://statutes.capitol.texas.gov/docs/gv/htm/gv.2155.htm Professional Services are defined in Section 2254.002, Texas Government Code.
34.	General	Since DIR has a lot of other cooperative contracts such as DBITS and ITSAC, can you clarify if we have access to the existing documentation of the incumbents for this contract	This is a new RFO, so there are no previously awarded vendors.
35.	General	What date will be the cutoff date for addendums to be released? This impacts the ability to submit a complete response earlier than the due date.	DIR does not have a cutoff date for the release of addendums. Generally, DIR will provide the last addendum no later than one (1) week prior to the RFO close date; however, it is Respondent's responsibility to monitor the ESD and respond to changes made by DIR to the solicitation.
36.	General	What is the budget allocated for this contract	See answer to question 31.
37.	General	Are there any specific capabilities/services that state agencies are looking for? The RFP provides a washlist of all AI applications. Should we just make assumptions on the services/capabilities that state agencies will want?	See answer to question 31.
38.	General	What does it mean that Pricing is the biggest factor in the decision criteria? How are you evaluating pricing?	See RFO Section 4.2.2 Weighted Evaluation Criteria (a) 1. Product and Services Pricing (Exhibit E) - 40%, while the Contract Marketing and Customer Support Plan is 30% and Respondent Experience is weighted at 30%. Pricing is evaluated on the level of discount offered off of MSRP/List Price.

#	RFO Section	Vendor Question	DIR Answer
39.	General	Will you provide point of contacts of the state agencies, to the successful vendors, in order to market directly to agencies, local governments?	Awardees are referred to the Texas Open Data Portal for agency contact information. https://dir.texas.gov/office-chief-data-officer/texas-open-data-portal
40.	General	Any idea the number of users the DIR supports?	See answer to question 31.
41.	General	Can you have a product on multiple DIR contracts	Yes.
42.	General	Is the HUB Office available to review the HSP prior to bid submission to ensure proper completion of the forms?	Yes.
43.	General	How many vendors will be selected - e.g. will you have a specific number targeted for each of the areas of AI you've outlined?	DIR does not have an anticipated number of awards for this solicitation.
44.	General	Do you accept Digital signature in lieu to actual ink signature	Yes.
45.	RFO Section 1.4. BidStamp Vendor Information System (VIS) Portal	I have a Bidstamp, did you see vendors now or do you see them only when RFO is submitted by vendor?	DIR can view Respondent names that are registered in BidStamp and have selected to follow a specific solicitation number. The files uploaded are not viewable until after the submission is received and the solicitation due date has closed.
46.	RFO Section 2.1 Overview and Scope	I know DIR won't promote to specific customer agencies, but based on these areas that y'all came up with (e.g. AI, Machine Learning, RPA, NLP, CV), do you have example agencies who have expressed interest in these areas?	See RFO Section 2.1.1. (e) Successful Respondent(s) to this RFO should be able to work with Customers on a variety of their specific needs across a broad range of governmental administration functions, such as health, public safety, transportation, housing, outdoors and recreation, employment, occupational and professional licenses, tourism, agriculture, regulatory, justice, and education.

#	RFO Section	Vendor Question	DIR Answer
47.	RFO Section 2.1.1 Scope Overview	Section 2.1.1 (f) of the RFO states, "Standalone hardware is outside the scope of this RFO and only software products and services should be offered." May the bidder propose Internet of Things IoT hardware devices as a product component of a full end to end AI services solution?	Hardware products that are necessary to support the use of software products may be considered but must be bundled with the software products.
48.	RFO Section 2.3 Emerging Technologies	Re: RFO 2.3. Page 10 Emerging Technologies, DIR reserves the right to consider the addition of services to support emerging technology such as next generation, enhancements and upgrades for products or services that are within the scope of DIR-CPO-TMP-441. Successful Respondent may propose such service categories throughout the term of the Contract. What is the process for proposing added services to support emerging technology and enhancements/upgrades to this DIR contract after award?	Successful Respondents should contact their assigned DIR Contract Manager to request consideration if their proposed next generation products or services are within scope of the RFO. The DIR Contract Manager will then process the request for consideration.
49.	RFO Section 2.3 Emerging Technologies	Referring back to the question about Emerging Technologies; DIR reserves the right to consider the addition of services to support emerging technology such as next generation, enhancements and upgrades for products or services that are within the scope of Does this rule apply to other DIR contracts as well?	If the Emerging Technologies language was included in the solicitation documents for that contract, then yes, it would apply.
50.	RFO Section 2.5 Electronic and Information Resources (EIR) Accessibility	Could you please clarify the criteria for evaluation for the accessibility items?	Criteria for evaluation of EIR Accessibility can be found in RFO Section 2.5 Electronic and Information Resources (EIR) Accessibility.

#	RFO Section	Vendor Question	DIR Answer
51.	RFO Section 2.5. EIR Accessibility	Are Accessibility requirements applicable to this RFO, which is centered around data processing, and other backend processes that may not be exposed to end users via User Interface	See RFO Section 2.5 EIR Accessibility. EIR Form Applicability is outlined in Section 2.5.1. Each respondent must provide the mandatory EIR accessibility documentation as well as the specific required documentation that applies to their offerings.
52.	RFO Section 2.5.1. (c) EIR Form Applicability	Which services requested in this RFO (AI, Machine Learning, RPA, NLP, Computer Vision, Digital Assistant) qualify for a VADSIR in the eyes of the DIR?	EIR documentation requirements depend on the kinds of products and services being provided in the categories mentioned. See RFO Section 2.5.1. EIR Form Applicability and Section 2.5.3 VADSIR Submission and Review.
53.	RFO Section 2: Scope	As a service provider we do not manufacture any SW. We have certifications and references with many software providers' products but do not wish to sell software products. Is it possible to submit a compliant bid in this case?	Yes. Respondents may propose stand-alone services.
54.	RFO Section 2: Scope	We would like to understand your definition of a "service". For example, you describe key solutions for machine learning as follows: 2.1.3 Machine Learning Machine learning is a process that uses rules and procedures to provide advanced statistical analysis or prediction without having to apply explicit instructions. Machine Learning uses datasets streamed into models to describe, recommend or forecast trends and patterns. Examples of machine learning solutions covered by this RFO include, but are not limited to.....	Texas Government Code Chapter 2155 provides a formal definition of services at the link below: https://statutes.capitol.texas.gov/docs/gv/htm/gv.2155.htm

#	RFO Section	Vendor Question	DIR Answer
55.	RFO Section 2: Scope	Is the expectation that all responses include solutions to all 6 areas defined under AI?	It is not a requirement to provide solutions to all areas defined under AI, but more comprehensive offers will be more competitive under this solicitation. Per RFO Section 2.1.1.(c), it is of special interest to DIR to establish contracts with respondents that have the history and capacity to provide a comprehensive approach. Per RFO Section 2.1.1.(c), preferably, services provided would be able to assist the Customer through all phases in the AI life cycle.
56.	RFO Section 2: Scope	Understand section 2.1.1. However, will our company not be considered "as much" if our core revolves around NLP and Digital Assistant vs. RPA?	RFO Scope Section 2.1 is not outlined in order of importance. See answer to Question 55.
57.	RFO Section 2: Scope	Which State Agencies are actively looking at implementing AI solutions? (TexcelVision / HUB Company - sales@texcelvision.com, 832 886 1280)	See answer to question 46. A specific listing of state agencies and their AI goals is not available at this time.
58.	RFO Section 2: Scope	Sology Solutions is a Systems Integrator and we read this RFO as lending itself more to the non-COTS as AI is an enabler and not necessarily a product/. How can we best propose our Systems Integration abilities in bringing elements of the integrated solutions from different players in our eco system and integrating and delivering a full solution that addresses the desired outcome as stated by your client?	System integration abilities can be outlined in the itemized pricing sheet using categories, sub-category, and resource descriptions along with their hourly rates. Respondent should use the forms provided to outline its history and experience within those areas outlined in the Section 2 Scope of the RFO.
59.	RFO Section 2: Scope	I gather you need companies that can provide a specific product ML, RPA, NLP, CV etc. Is that correct?	Respondent must be able to provide the products and services as outlined in RFO Section 2 Scope.

#	RFO Section	Vendor Question	DIR Answer
60.	RFO Section 2: Scope	We are a Services provider firm can DIR clarify if we qualify for this contract	See answer to question 53.
61.	RFO Section 2: Scope	Is the Request for Offer (RFO) for Artificial Intelligence (A.I.) Products and Services including operationalizing data models or is it looking for algorithms in their specific domain outside of RPA?	See answer to question 31.
62.	RFO Section 2: Scope	As we begin the journey into AI with state and local municipalities, have you identified how you will share state, national, and possibly larger sets of data? Have you identified a state based repository of information that we may be generally looking for and the definition of said data?	See answer to question 31.
63.	RFO Section 3.4 Historically Underutilized Businesses	What happens if your AI solutions (i.e. software) do not require any sub contractors?	Each respondent should decide how they can best fulfill the contract and shall complete the corresponding Good Faith Effort Method of the HUB Subcontracting Plan (HSP).
64.	RFO Section 3.4 Historically Underutilized Businesses	Can we change/modify HUB contractors and conditions during the term of contract?	Yes, once awarded a contract, the HSP can be updated.
65.	RFO Section 3.7.2 References	If I email to my references, will the reference responses be listed in VIS as they are received by DIR?	No. DIR recommends that Respondents ask references to cc the Respondent when the Reference submits the form to DIR.
66.	RFO Section 3.7.2 References	How many vendor references should be submitted?	DIR is requesting a total of three (3) references. Any additional references received beyond the first three (3) will not be considered.
67.	RFO Section 3.7.2 References	Do you require 3 references per category or 3 references total? Can we reuse references that we obtained for DBITS?	Three (3) references total. References must submit the reference form that is included with the AI RFO DIR-CPO-TMP-441.

#	RFO Section	Vendor Question	DIR Answer
68.	RFO Section 3.7.2 References	You mentioned needing 3 references. Is that 3 references per category (e.g. RPA) or 3 for the entire RFO?	See answer to question 66.
69.	RFO Section 4.1 Evaluation of Responses	What are requirements for Financial Review?	Respondents must provide their DUNS number. DIR's Chief Financial Office oversees the financial review based on the company's Dun & Bradstreet report.
70.	Terms and Conditions Section 7.14 DIR Cost Avoidance	In 7.14 of the Standard Terms and Conditions, please elaborate as to what is required in the report the DIR expects, specifically in terms of the pricing of services from alternative sources.	A revised Terms and Conditions is currently being developed; DIR anticipates changes to the referenced section along with other areas due to recently enacted legislation.

END

ADDENDUM 4

SOLICITATION NUMBER:	DIR-CPO-TMP-441
SOLICITATION NAME:	Artificial Intelligence (AI) Products and Services
ADDENDUM NUMBER:	4

Addendum Date: October 12, 2021

If you should have any questions regarding this Addendum, please contact:

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Notice is given to Respondents desiring to submit a response to the above referenced solicitation that additional information is required:

This Addendum modifies the solicitation for Artificial Intelligence (AI) Products and Services, Solicitation No. DIR-CPO-TMP-441, released July 29, 2021. It informs the parties that:

It revises RFO Section 3.3.1 Schedule, revises RFO Section 2.1 Overview and Scope, revises Exhibit A Respondent Information, revises Exhibit B Respondent History and Experience, adds Microsoft Excel document titled ABC_441_Exceptions.xlsx, and includes the answers to questions received prior to the due date and time published in the RFO.

In the submission of its response to this solicitation, Respondents shall submit this signed “page one” of the Addendum, acknowledging receipt of the Addendum.

Respondent Acknowledgment of Receipt

(printed entity name)

(printed name of authorized representative)

(signature of authorized representative)

(date)

Item 1:

RFO Section 3.3.1 RFO Schedule has been replaced in its entirety with the following:

3.3.1 RFO Schedule

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

Table 1: Tentative Schedule of Events

Date/Time	Activity
July 29, 2021	Publish RFO on Electronic State Business Daily (ESBD)
August 20, 2021 2:00pm (CT)	Optional Vendor Conference
September 10, 2021 5pm (CT)	Deadline for submitting questions
November 3, 2021 2:00 PM (CT)	Deadline for submitting responses to RFO Deadline for DIR to receive Vendor references
November 4, 2021 – until completed	Evaluation of responses, negotiation, and contract execution

Item 2:

Exhibit A Respondent Information has been replaced in its entirety with the attached document. The changes are (1) in Item 3, "DUNS # or Federal Tax ID #" has been changed to "DUNS # and Federal Tax ID#"; (2) in Item 17 "Transmittal Letter and Executive Summary" has been removed from Mandatory Response Contents; and, (3) Item 12 has been corrected to identify the Standard Terms and Conditions as Attachment 2.

Item 3:

Exhibit B Respondent History and Experience has been replaced in its entirety with the attached document for various improvements to allow Respondents to highlight their experience.

Item 4:

RFO Section 2.1 Overview and Scope now includes:

2.1.8 Ancillary Services

Ancillary products and services that support of the Scope outlined above may also be considered in order to provide a full solution for DIR customers. The products and services would only be eligible if they are required to achieve the customer's deliverables in the above outlined areas in AI, ML, RPA, NLP, CV, and DA. **Any ancillary products and services awarded may not be provided to the customer as stand-alone products and services.**

Item 5

Microsoft Excel Spreadsheet titled ABC_441_Exceptions.xlsx that is referenced in Exhibit A Respondent Information Item 12 has been added.

Item 6:

The following table outlines vendor questions, references Request for Offer (RFO) sections and the Department of Information Resources (DIR) response to questions received prior to the due date and time published in the RFO:

Question and Answer Document

Posted September 3, 2021 as part of Addendum 2

#	RFO Section	Vendor Question	DIR Answer
1.	RFO Section 2 Scope	Is the Request for Offer (RFO) for Artificial Intelligence (A.I.) Products and Services including operationalizing data models or is it looking for algorithms in their specific domain outside of RPA?	The specific needs of the DIR Customer will determine the details of the RPA requirements. See RFO Section 1.3 Background.
2.	Exhibit B History and Experience	1. How much of a subcontractor's past performance can we include in the response? 2. How much weighting does past performance with the state have?	Proposals will be evaluated on the strength of the respondent's (prime) pricing, contract marketing and customer support plan, and experience. See Section 4.2.2 Weighted Evaluation Criteria. Respondent's Experience will make up 30% of their total score.

#	RFO Section	Vendor Question	DIR Answer
3.	Exhibit E Itemized Price Sheet - Services Worksheet	For providing the Services pricing, are you expecting us to provide consulting hourly rates for the typical roles on these projects? Or are you wanting "prices" for a whole project? Prices for a whole project may be difficult to provide since they vary based on things such as the overall scope of the effort, the amount of data that has to be cleansed/integrated/harmonized (before AI algorithms can be applied), the quality of data, the level of accuracy expected etc. Perhaps we could provide Cost ranges - high and low - for what we have seen for these types of projects in the past. Please provide some guidance on this.	Services typically are outlined by resource description and their hourly rates.
4.	Exhibit J Reference Form	Are only 3 references required for the response? Or are 3 references required per category? Please confirm.	We request three (3) references total. After the third reference is received, no others will be considered.
5.	Exhibit G VPAT	If we are a services only firm, we do not have to submit Exhibit G, is that correct? How do we indicate that we are services only and will not submit an Exhibit G, so as to remain compliant with required response documents?	See Section 2.5.1 EIR Form Applicability Letter (a) and (b) that provides details on the applicability of Exhibit G to specifically COTS product offerings only and Exhibit H to specifically development services only. Section 2.5.2 and 2.5.3 indicates that Vendors not providing ACRs or VADSIRs, respectively, must attest that the documentation does not apply to their product offerings in Item 13 of Exhibit A Respondent Information.

#	RFO Section	Vendor Question	DIR Answer
6.	Exhibit F - EDGAR Certification Form	Is this form required to be submitted with our response? Or submitted at the time that we will contract with an educational institution for services? (Per RFO instructions in 3.5.2E 'In such cases, upon request from eligible Customer, Respondent must complete EDGAR')	Please provide Exhibit F – EDGAR Certification Form with your response. You may also provide a copy of the same form upon request from eligible DIR customers.
7.	Exhibit B History and Experience	Beyond the 2 page narrative of Respondent History; there is no requirement for narrative description of a vendors experience or methods. Are the client references the primary method of verifying experience? If we were to include narrative within the history and experience section, would that be beneficial to the reviewers?	The respondent's experience should be outlined in the 2-page limit narrative of Exhibit B. The reviewers will also take into account reference materials as supplemental to what's outlined in Exhibit B.
8.	RFO 3.5.1B	The RFO State: "Respondents to this RFO must propose to make sales to Customers in one (1) of the following ways: i. Respondent will sell directly to Customers through a Co-op Contract. ii. Respondent will execute a Co-op Contract with DIR and designate one (1) or more qualified dealers or resellers to sell directly to Customers on its behalf. Respondent may also sell directly to Customers." Are services (only) providers able to respond to this solicitation? Or only software/hardware providers?	Services are also allowable as described by the RFO's tile Cybersecurity Products and Services. See also Scope Overview Section 2.1.1 (a) "...products and services."

#	RFO Section	Vendor Question	DIR Answer
9.	Overall Response	Please confirm the requested naming convention for all required response components	When uploading documents to BidStamp, please upload as separate files using brief and descriptive names. Use of special characters, such as !#\$*, may create technical system errors when attempting to upload the documents.
10.	Exhibit F - EDGAR Certification Form	Does the CIQ form need to be completed and submitted as part of the response? Or is that completed when an SOW is signed with a DIR customer?	See Question 6.
11.	Exhibit B History and Experience	If one client experience fits into more than 1 of the 6 AI categories outlined in this RFO - should we just list it as part of 1 of the categories, or is it ok to list it as part of multiple?	The client's experience may be described being relevant to multiple categories if that is the case.
12.	Overall Response	Will a transmittal letter and executive summary be reviewed as part of the scoring process?	Neither the transmittal letter nor the executive summary will be considered in the scoring process.
13.	RFO Section 3.4.1 HUB Subcontracting Plan	It states "ALL RESPONDENTS RESPONDING TO THIS RFO, INCLUDING THOSE THAT ARE HUB CERTIFIED OR THOSE WHO DO NOT PLAN TO SUBCONTRACT, MUST COMPLETE A HUB SUBCONTRACTING PLAN (HSP) IN ACCORDANCE WITH THE STATE'S POLICY ON UTILIZATION OF HUBS. " If the Successful Respondent does not plan to subcontract, Successful Respondent must state that fact in their plan. Is use of HUBs required?	If respondent intends to Self-Perform they would explain how they intend to Self-Perform in Section 3 of the HUB Subcontracting Plan (HSP)
14.	Exhibit B History and Experience	Question 6 asks for Texas Authorized Consortia. Can you provide a list of Texas authorized consortia, that we can verify our participation in?	Some examples of such consortia are NASPO, TIPS, OMNIA, and GSA.
15.	Exhibit J Reference Form	Can we use the same reference for multiple categories or do we need 3 unique references per each category?	Only three (3) references total will be considered.

#	RFO Section	Vendor Question	DIR Answer
16.	Exhibit J Reference Form	There is nothing that specifies which category the references are sending them in for. Where should this be specified?	References are not intended to be category specific. No more than three (3) references will be considered.
17.	All sections requiring signature	Does each document in the submission package have to be signed by the same signatory? Or can different individuals sign documents, so long as they are all executive representatives?	Signatures may be by multiple representatives, but they must be authorized by the company to contractually bind the company.
18.	Exhibit J Reference Form	For question 4, are you looking for responses in Texas only or countrywide?	There are no geographical limitations to the reference's location.
19.	Exhibit A	For question 16 Proof of Financial Stability, is there a document we need to provide or an action we need to take or will the Comptroller of Public Accounts research this on their own?	To receive an award through this solicitation, respondents will need to be registered with the Comptroller of Public Accounts Franchise Tax office and be in good standing. To confirm registration and status visit https://mycpa.cpa.state.tx.us/coa/search.do
20.	Exhibit J Reference Form	If we have a reference that is willing to submit the reference form on our behalf but they would like their response to be confidential and their name to not be used publicly, how do we go about this? Are all references that are submitted considered private therefore not shared unless it is in our formal response?	See RFO Section 3.11. Public Information. DIR is a government agency subject to the Texas Public Information Act. Responses submitted to DIR as a result of this RFO are subject to release as public information after contracts are executed or if the procurement is terminated.

#	RFO Section	Vendor Question	DIR Answer
21.	Exhibit C Contract Marketing Customer Support Plan	<p>Exhibit C asks for "Provide a sample of a Service Level Agreement (SLA) between you and DIR for DIR Customers containing the following by not limited to:</p> <p>a) Reporting to be provided to DIR and when; b) On-boarding times; c) Order Tracking communications; and d) Follow-up process and timeline."</p> <p>Can this service level agreement be in addition to the 10 page limit? This means questions 1-7 in Exhibit C would be up to 10 pages, and the SLA sample would go beyond.</p>	The 10-page limit does not apply to the SLA sample.
22.	Transmittal Letter and Executive Summary, Exhibit B, Exhibit C	These sections have page limits. Do title page and table of contents count in the page limit? Or are these excluded?	Title pages and table of contents do not count towards the page limits.
23.	RFO Section 3.7.1.(a)	3.7.1a) Exhibit A Respondent Information it says to fill out Attachments 1 and 2 "if applicable". However, Attachment 1 is a Sample Contract and Attachment 2 are the Standard Terms and Conditions. What items would be filled out in those attachments?	See Item 1 of this Addendum 2 that amends RFO Section 3.7.1(a).

#	RFO Section	Vendor Question	DIR Answer
24.	RFO Section 3.5.5.	Section 3.5.5 Cybersecurity Training calls out that the cybersecurity training program must be certified under Section 2054.519, Texas Government Code. Can our (vendor) employees make use of the client's certified cybersecurity training programs as they onboard with the client? Or is it expected that the vendor provide this training internally? Or through a third-party provider? Or from DIR?	More information on required cybersecurity training can be found at https://dir.texas.gov/View-About-SECURITY/Pages/Content.aspx?id=154 or by sending an email to TXTrainingCert@dir.texas.gov.
25.	Exhibit B History and Experience	For questions 2,3,&4 many of our projects span across several of these disciplines and we do not recognize sales against these same naming conventions. Can we provide our expertise for these combined disciplines or do we have to break out our answers for each of the six categories?	You may provide your history and experience for any one or combination of the disciplines outlined in scope section. It is not necessary to break out answers based on the categories.
26.	RFO Section 2 Scope	Hoping you can confirm if the Texas Dire – AI RFP is an OEM RFP, not a systems integrator RFP.	Both OEMs and system integrators are welcomed to respond to this RFO.
27.	RFO Section: 3.7.2 References, Page: 22,	Can we include past performance references from our subcontractor teammates?	References should be received from companies or government agencies that were clients that received products or services from the respondent.
28.	RFO Section: 3.7.2 References, Page: 22,	Is it acceptable if the references cover some of the services listed in the RFO (AI, Machine Learning, Robotic Process Automation (RPA), Natural Language Processing (NLP), Computer Vision (CV) and Digital Assistant products) but not all the services?	Yes, it is acceptable that any of the references may cover any one (1) or all or any combination of the categories listed in the areas of AI, Machine Learning (ML), Robotic Process Automation (RPA), Natural Language Processing (NLP), Computer Vision (CV) and Digital Assistants (DA) products or services.

#	RFO Section	Vendor Question	DIR Answer
29.	RFO Section: Transmittal Letter and Executive Summary, Page: NA,	For the purpose of response, can we have transmittal letter and executive summary as separate documents?	Yes, the required transmittal letter and executive summary may be uploaded to BidStamp as separate documents.
30.	RFO Section: General, Page: NA,	The resources who will be undertaking the scope of work for DIR customers- Are they required to be working Onsite or would a hybrid structuring of resources be acceptable(outside of North America via remote correction)?	DIR Customer will provide final determination of onsite/offsite requirements based on their specific needs for the mission.
31.	RFO Section: 1.3.4 Cost Recovery, Page: 5,	"The administrative fee must be included in the Successful Respondent's price to the Customer and paid to DIR by the Successful Respondent. " - We are assuming that this fee need to be included in the price sheet to be submitted?	The Excel spreadsheet (Exhibit E) will automatically make the calculation of the DIR customer price based on the respondent's entries of MSRP/List price and discount percentage off. The calculation will be... DIR Customer Price = MSRP x (1-DIR Discount%) x (1+0.75%).
32.	RFO Section: 3.7.1 Mandatory Response Contents, Page: 23,	Will the price submitted in Exhibit E be binding or would we have further optimization while doing contract with DIR customers?	Vendors would be able to offer further discounts while doing business with DIR customers. Additional, additional discounts like aggregate and volume discounts can be negotiated with the DIR customer at the time of purchase.

#	RFO Section	Vendor Question	DIR Answer
33.	RFO Section: 2.5.2 VPAT Submission and Review – COTS Offerings, Page: 13	<p>"Vendor submissions with missing accessibility documentation or blatantly misrepresented documentation will result in disqualification." In the same section it is mentioned that if the products are exempted from such testing can mention in "Notes" located in the product information section of the VPAT v.2.3 or higher, or as an additional note in the product information section of older VPAT versions of the form, specifying each exempt product or product family with a supporting statement(s) for this position. V"- Please clarify on what is the actual criteria for exemption</p>	<p>DIR requires vendors proposing Commercial Off the Shelf (COTS) products, including Software as a Service (SAAS), to provide Accessibility Conformance Reports (ACR) created by using a VPAT.</p> <p>If the proposal includes software, hardware, or services that have a user interface for access by the public or employees of state agencies and institutions of higher education then a VPAT is required to be submitted with the response to RFO.</p> <p>Resellers must obtain ACRs from the manufacturer or provide links to the manufacturer's accessibility documentation.</p> <p>Vendors claiming that a proposed product or family of products is exempt from accessibility requirements must specify the product(s) as such in "Notes" for exempt product or product family with a supporting statement(s) for this position.</p> <p>Texas Government Code, Chapter 2054, Subchapter M requires state agencies and institutions of higher education to procure EIR that complies with the accessibility standards defined in the Texas Administrative Codes 1 TAC 206, 1 TAC 213, and in the Worldwide Web Consortium WCAG 2.0 AA technical standard as applicable.</p>
34.	RFO Section: 3.7.2 References, Page: 22, Question:	Can the respondent contact be CC'ed in the email that the reference contact would send to DIR?	Yes. The respondent can be cc'd when the reference is sending their reference form (Exhibit J) to DIR.

#	RFO Section	Vendor Question	DIR Answer
35.	RFO Section: 2.5.3 VADSIR Submission and Review – non-COTS Offering, Page: 12, Question:	We understand that VADSIR is required to demonstrate vendor ability to produce accessible electronic and information resources at an organization level and is not dependent on the type of services/products offered. Please confirm our understanding.	VADSIR are applicable to specifically one or more of the development services outlined in Section 2.5.3.
36.	RFO Section: 2.5.4 PDAA Submission and Self-Assessment Score – All Offerings, Page: 12, Question:	We understand that PDAA is required to demonstrate vendor ability to produce accessible electronic and information resources at an organization level and is not dependent on the type of services/products offered. Please confirm our understanding.	Yes, a PDAA is required to be submitted by all respondents in addition to any applicable ACR/VPAT or VASDIR.
37.	RFO Section 2.1.4	Robotic Process Automation (RPA) In an effort to minimize inconvenience for reference clients, would DIR consider allowing references that have previously been submitted for DBITS to be used for this RFO?	Yes, but the reference must use the Exhibit J Reference Form that was included with this RFO AI Product and Services DIR-CPO-TMP-441. They may not submit the same form submitted for another RFO and will need to submit a new one.
38.	RFO 2.3. Emerging Technologies page 10,	DIR reserves the right to consider the addition of services to support emerging technology such as next generation, enhancements and upgrades for products or services that are within the scope of DIR-CPO-TMP-441. Successful Respondent may propose such service categories throughout the term of the Contract. What is the process for proposing added services to support emerging technology and enhancements/upgrades to this DIR contract after award?	Successful respondents should contact their assigned DIR Contract Manager to request consideration if their proposed next generation products or services are within scope of the RFO. The DIR Contract Manager will then process the request for consideration.

#	RFO Section	Vendor Question	DIR Answer
39.	RFO 1.4.3 BidStamp/VIS Price Form instructions page 5 (mandatory requirement when offering brand products), a.	Is the Respondent required to complete both the pricing form in BidStamp and submit Exhibit E, itemized price sheet if the Respondent is offering both software and services? b. If yes, please confirm the Respondent should complete the BidStamp pricing form for software products only.	The respondent should complete the BidStamp pricing form for software products only, not stand-alone services.
40.	RFO 3.7.1. d) page 21	Sample HUB Subcontracting Plan NOTE: For the purposes of the HUB Subcontracting Plan, Order Fulfillers designated by a manufacturer or publisher to sell directly to Customers on its behalf are considered subcontractors. Please define "Order Fulfillers" in this context? Would an authorized reseller be considered an "Order Fulfiller?"	Yes
41.	RFO 3.7.1. d) page 21	Sample HUB Subcontracting Plan. Does a HUB need to be a direct subcontractor or can a HUB be a subcontractor to a subcontractor? If the latter, how many levels of subcontracting are permitted?	A respondent would only identify the first-tier subcontracting on their HUB Subcontracting Plan (HSP)
42.	RFO Section 3.7.2. Page 22	References: Respondent may submit the Exhibit J Reference Form to companies or government agencies through the BidStamp VIS. AND Bid Stamp Vendor References: Reference forms are being sent via BidStamp as a courtesy. Please confirm sending reference forms through BidStamp is not required. Please confirm the Vendor References section in BidStamp would not need to be completed when submitting a response if the Respondent is not sending reference forms through BidStamp.	Respondents may have the Reference Form (Exhibit J) forwarded to their references either through BidStamp or by providing the Reference Form (Exhibit J) directly to their reference via email. It is not required that the respondent use BidStamp to forward the form to their references.

#	RFO Section	Vendor Question	DIR Answer
43.	Exhibit E, itemized price sheet:	Regarding services pricing, does DIR prefer to receive 1) hourly rates, 2) a base service package that would be customized based on the software selected and the agency procuring the solution, or 3) both?	Either are acceptable, but the respondent should note that the base of DIR customers varies across a wide range of channels and the purchasers' needs will vary greatly. Stand-alone services are typically outlined using resource description and hourly rate.
44.	EXHIBIT J - REFERENCE FORM	In this form, the VENDOR Quality of Artificial Intelligence (A.I.) Products and Services asks: 1. Have you purchased any Artificial Intelligence (AI) Products and Services from this Vendor in the past 2 years? Yes____ No____ QUESTION: If the reference selects 'No' in the appropriate box will this information disqualify the vendor?	No, the Reference Form (Exhibit J) is not a pass/fail item and will only be used to take into consideration the respondent's history and experience in providing the products and services outlined in the RFO's Section 2 - Scope.
45.	EXHIBIT J - REFERENCE FORM	Halff requests clarification on the Reference forms being sent via BidStamp as a courtesy - must we submit our reference parties names and contact information through BidStamp, or can we send the form ourselves to our references (as long as they respond directly to DIR with their responses)? If DIR has to be the one sending the forms, is there a deadline when our references names must be submitted by? And when when the forms be sent to the references?	The Reference Form may be sent to your reference either through BidStamp or by emailing the form to the reference directly. The respondent is the one providing their reference the form.
46.	EXHIBIT J - REFERENCE FORM	Can our references be from Oklahoma?	There are no geographical limitations placed on the reference's location.
47.	GENERAL	Should our final submittal be one pdf? Or should each "mandatory response content" item from the checklist be uploaded a separate pdf, word or excel file (whichever is applicable)? [Checklist is on page 5, Exhibit A, no. 17]	Uploading separate files are preferred.

#	RFO Section	Vendor Question	DIR Answer
48.	GENERAL	Should the Letter of Transmittal and the Executive Summary listed in the checklist be two separate documents? Are there any page limitations or specifications for these requirements? [Checklist on page 5, Exhibit A, no. 17]	The letter of transmittal and executive summary may be separate documents. The page for the two items is 1 page each.

Posted September 16, 2021 as part of Addendum 3

(Note: Cross-references in DIR Answer column have been appropriately renumber.)

#	RFO Section	Vendor Question	DIR Answer
49.	1.3.5 Historical Sales	What % of cooperative contracts historical sales can be related to AI services?	DIR does not have historical sales regarding AI Products and Services.
50.	Attachment 1 Standard Contract Terms and Conditions	Do we need to submit a red-lined version of Attachment 1 (Standard Contract Terms and Conditions) if we have no exceptions to request?	No. If there are no exceptions taken, then a redlined version of Attachment 1 Standard Terms and Conditions is not applicable.
51.	Exhibit A Respondent Information	There is no question in the Information template where we can talk about products and services. Where should we provide content on products and services ?	Respondents should utilize the appropriate sections of Exhibit B History and Experience or Exhibit C Contract Marketing and Support Plan
52.	Exhibit B History and Experience	Is there any limit on number of pages for History and Experience section?	In no more than two (2) pages, provide a detailed history of your company. There are no other limits to the remainder of the questions.
53.	Exhibit B History and Experience	Exhibit B - is there a page limit for this requirement?? In previous RFO there have been restrictions.	See answer to Question 52.
54.	Exhibit B History and Experience	Kindly let us know where do we showcase our AI experience and capabilities? It seems like Attachment B doesn't have a space for capabilities.	Please use Exhibit B Question 1 to showcase your AI company's history and experience in providing AI capabilities. DIR may make changes to this form through the issuance in a future addendum.
55.	Exhibit B History and Experience	Are there any page limitations on our experience and capabilities descriptions in Exhibit B?	There is a 2-page limit for the description of your company's history/experience (Exhibit B - Question 1).

56.	Exhibit B History and Experience	I'm with a software vendor, who will leverage a distributor to submit on this. Should the history of performance represent the software vendor or the submitting distributor?	The Exhibit B History and Experience should represent the respondent's history and experience, not the distributor or manufacturer they represent.
57.	Exhibit E Itemized Price Sheet	Is a labor rate card acceptable for services pricing?	Services must be entered into Exhibit E Itemized Price Sheet, Tab 3
58.	Exhibit E Itemized Price Sheet	Should services be limited to the products we list in the products sheet?	Respondents may provide "related services" (product training, installation, warranty, and maintenance) as well as "stand alone services" that are not tied to a specific software product.
59.	Exhibit E Itemized Price Sheet	Where do we put information about price increases over the life of this?	The DIR contract would tie the Successful Respondent to the discount percentage offered. Changes to MSRP/list prices may be managed throughout the life of the contract by working with the assigned DIR contract manager.
60.	Exhibit E Itemized Price Sheet	Can the price be provided as a range?	No.
61.	Exhibit E Itemized Price Sheet	Can DIR clarify if they have a List of services that can be filled in the Exhibit E Itemized Pricing Sheet Tab 3 Services	Respondent should use outline the services being proposed in Tab 3 of Exhibit E Itemized Pricing Sheet.
62.	Exhibit E Itemized Price Sheet	For a Category if we mention the service to be provided as implementation how do we provide the rate for it. Please clarify?	Services can be outlined in the itemized pricing sheet using categories, sub-category, and resource descriptions and their associated hourly rates.
63.	Exhibit E Itemized Price Sheet	Exhibit E Itemized Pricing Sheet Tab 3 Services seems more suitable for product not service. Can DIR Clarify if it is a mistake or Not? If Not, can you provide a sample of how to fill it	See answer to question 62.

64.	Exhibit E Itemized Price Sheet	Will awards allow for "fixed price" services vs. Time and Materials hourly pricing?	Fixed unit pricing or labor rates are acceptable. For labor rates, provide clear descriptions of the resource and their hourly rate. If fixed unit pricing is used, provide a clear description of the function being provide within the unit and the unit price.
65.	Exhibit E Itemized Price Sheet	Can you elaborate on pricing - is this time and materials, deliverables based, etc?	Enter pricing information in the Exhibit E Itemized Price Sheet. See Tab 1 - Instructions.
66.	Exhibit E Itemized Price Sheet	If we have several parts (hundreds) from a specific software brand, can we just provide a discount per brand instead of a price for each individual part?	The Exhibit E Itemized Price Sheet will need to include each and every item the respondent would like to offer to DIR Customers.
67.	General	Are you looking for respondents to?: 1. Define "model building/development", as an example, with definitions of complexity, model types, data collection and data preparation work needed etc., and then arrive at a base price that is then provided to you, or 2. Provide rates/hr for different skill sets at different levels of experience, since these solutions will not have fixed, universally understood defintions.	Since the specific needs will be determined by the DIR Customer, providing resource descriptions along with hourly rates is typical for vendors outlining their service offerings.
68.	General	Will these slides be available after the webinar?	Yes, they can be found within Addendum 1 on the Electronic State Business Daily (ESBD).
69.	General	Will you release ansewers to questions on a daily bases or will you release them all at once.	DIR intends to release answers to questions weekly through addendums posted to ESBD.

70.	General	Is there any legacy data regarding the current uses of AI, Machine Learning, RPA, NLP, and CV?	Some examples of organizations providing data on this emerging technology includes the National Artificial Intelligence Initiative, (www.ai.gov), U.S. Government Accountability Office (GAO) (https://www.gao.gov/products/gao-21-519sp), and DIR AI Center of Excellence. (https://dir.texas.gov/enterprise-solution-services/artificial-intelligence-ai-center-excellence)
71.	General	Has State of TX identified some of the AI Projects / Use cases that need to be addressed in near future? - TexcelVision	See answer to questions 70 & 79.
72.	General	Another question: Do you require products to be Fed Ramp certified?	All applicable federal, state, and local laws and regulations apply. While DIR does not universally require FedRamp certification for all products, requirements may vary by Customer.
73.	General	Will you accept additional attachments that describe our products and services?	No. Please use the forms provided to describe your products and services.
74.	General	Can we bid as a prime and also as subs under other primes?	Yes.
75.	General	Is there a way to test/confirm that DIR can see an electronic signature?	No. Such capability does not exist at this time.
76.	General	Could we submit a different document for Executive summary?	Yes. The executive summary is limited to one (1) page.
77.	General	Do you have to be a Texas based company to submit a proposal?	No, but your company must be registered with the Texas Comptroller of Public Account's Franchise Tax office at the time of award. https://comptroller.texas.gov/taxes/franchise/
78.	General	Can we get a list of attendees from this RFO meeting?	The list of attendees of the optional pre-bid conference can be found in Addendum 1 posted to the ESBD.
79.	General	What projects, if any, are currently underway that would normally be considered under this contract?	See RFO Section 1.3 Background. Successful Respondent will work directly with DIR customers to determine customer needs.

80.	General	Will you be providing a list of attendees?	See answer to question 78.
81.	General	Can DIR clarify the difference between a Commodity contract and a Professional Services contract?	See Texas Govt Code Chapter 2155 for the State's definitions of goods and services: https://statutes.capitol.texas.gov/docs/gv/htm/gv.2155.htm Professional Services are defined in Section 2254.002, Texas Government Code.
82.	General	Since DIR has a lot of other cooperative contracts such as DBITS and ITSAC, can you clarify if we have access to the existing documentation of the incumbents for this contract	This is a new RFO, so there are no previously awarded vendors.
83.	General	What date will be the cutoff date for addendums to be released? This impacts the ability to submit a complete response earlier than the due date.	DIR does not have a cutoff date for the release of addendums. Generally, DIR will provide the last addendum no later than one (1) week prior to the RFO close date; however, it is Respondent's responsibility to monitor the ESD and respond to changes made by DIR to the solicitation.
84.	General	What is the budget allocated for this contract	See answer to question 79.
85.	General	Are there any specific capabilities/services that state agencies are looking for? The RFP provides a washlist of all AI applications. Should we just make assumptions on the services/capabilities that state agencies will want?	See answer to question 79.
86.	General	What does it mean that Pricing is the biggest factor in the decision criteria? How are you evaluating pricing?	See RFO Section 4.2.2 Weighted Evaluation Criteria (a) 1. Product and Services Pricing (Exhibit E) - 40%, while the Contract Marketing and Customer Support Plan is 30% and Respondent Experience is weighted at 30%. Pricing is evaluated on the level of discount offered off of MSRP/List Price.

87.	General	Will you provide point of contacts of the state agencies, to the successful vendors, in order to market directly to agencies, local governments?	Awardees are referred to the Texas Open Data Portal for agency contact information. https://dir.texas.gov/office-chief-data-officer/texas-open-data-portal
88.	General	Any idea the number of users the DIR supports?	See answer to question 79.
89.	General	Can you have a product on multiple DIR contracts	Yes.
90.	General	Is the HUB Office available to review the HSP prior to bid submission to ensure proper completion of the forms?	Yes.
91.	General	How many vendors will be selected - e.g. will you have a specific number targeted for each of the areas of AI you've outlined?	DIR does not have an anticipated number of awards for this solicitation.
92.	General	Do you accept Digital signature in lieu to actual ink signature	Yes.
93.	RFO Section 1.4. BidStamp Vendor Information System (VIS) Portal	I have a Bidstamp, did you see vendors now or do you see them only when RFO is submitted by vendor?	DIR can view Respondent names that are registered in BidStamp and have selected to follow a specific solicitation number. The files uploaded are not viewable until after the submission is received and the solicitation due date has closed.
94.	RFO Section 2.1 Overview and Scope	I know DIR won't promote to specific customer agencies, but based on these areas that y'all came up with (e.g. AI, Machine Learning, RPA, NLP, CV), do you have example agencies who have expressed interest in these areas?	See RFO Section 2.1.1. (e) Successful Respondent(s) to this RFO should be able to work with Customers on a variety of their specific needs across a broad range of governmental administration functions, such as health, public safety, transportation, housing, outdoors and recreation, employment, occupational and professional licenses, tourism, agriculture, regulatory, justice, and education.

95.	RFO Section 2.1.1 Scope Overview	Section 2.1.1 (f) of the RFO states,"Standalone hardware is outside the scope of this RFO and only software products and services should be offered." May the bidder propose Internet of Things IoT hardware devices as a product component of a full end to end AI services solution?	Hardware products that are necessary to support the use of software products may be considered but must be bundled with the software products.
96.	RFO Section 2.3 Emerging Technologies	Re: RFO 2.3. Page 10 Emerging Technologies, DIR reserves the right to consider the addition of services to support emerging technology such as next generation, enhancements and upgrades for products or services that are within the scope of DIR-CPO-TMP-441. Successful Respondent may propose such service categories throughout the term of the Contract. What is the process for proposing added services to support emerging technology and enhancements/upgrades to this DIR contract after award?	Successful Respondents should contact their assigned DIR Contract Manager to request consideration if their proposed next generation products or services are within scope of the RFO. The DIR Contract Manager will then process the request for consideration.
97.	RFO Section 2.3 Emerging Technologies	Referring back to the question about Emerging Technologies; DIR reserves the right to consider the addition of services to support emerging technology such as next generation, enhancements and upgrades for products or services that are within the scope of Does this rule apply to other DIR contracts as well?	If the Emerging Technologies language was included in the solicitation documents for that contract, then yes, it would apply.
98.	RFO Section 2.5 Electronic and Information Resources (EIR) Accessibility	Could you please clarify the criteria for evaluation for the accessibility items?	Criteria for evaluation of EIR Accessibility can be found in RFO Section 2.5 Electronic and Information Resources (EIR) Accessibility.

99.	RFO Section 2.5. EIR Accessibility	Are Accessibility requirements applicable to this RFO, which is centered around data processing, and other backend processes that may not be exposed to end users via User Interface	See RFO Section 2.5 EIR Accessibility. EIR Form Applicability is outlined in Section 2.5.1. Each respondent must provide the mandatory EIR accessibility documentation as well as the specific required documentation that applies to their offerings.
100.	RFO Section 2.5.1. (c) EIR Form Applicability	Which services requested in this RFO (AI, Machine Learning, RPA, NLP, Computer Vision, Digital Assistant) qualify for a VADSIR in the eyes of the DIR?	EIR documentation requirements depend on the kinds of products and services being provided in the categories mentioned. See RFO Section 2.5.1. EIR Form Applicability and Section 2.5.3 VADSIR Submission and Review.
101.	RFO Section 2: Scope	As a service provider we do not manufacture any SW. We have certifications and references with many software providers' products but do not wish to sell software products. Is it possible to submit a compliant bid in this case?	Yes. Respondents may propose stand-alone services.
102.	RFO Section 2: Scope	We would like to understand your definition of a "service". For example, you describe key solutions for machine learning as follows: 2.1.3 Machine Learning Machine learning is a process that uses rules and procedures to provide advanced statistical analysis or prediction without having to apply explicit instructions. Machine Learning uses datasets streamed into models to describe, recommend or forecast trends and patterns. Examples of machine learning solutions covered by this RFO include, but are not limited to.....	Texas Government Code Chapter 2155 provides a formal definition of services at the link below: https://statutes.capitol.texas.gov/docs/gv/htm/gv.2155.htm

103.	RFO Section 2: Scope	Is the expectation that all responses include solutions to all 6 areas defined under AI?	It is not a requirement to provide solutions to all areas defined under AI, but more comprehensive offers will be more competitive under this solicitation. Per RFO Section 2.1.1.(c), it is of special interest to DIR to establish contracts with respondents that have the history and capacity to provide a comprehensive approach. Per RFO Section 2.1.1.(c), preferably, services provided would be able to assist the Customer through all phases in the AI life cycle.
104.	RFO Section 2: Scope	Understand section 2.1.1. However, will our company not be considered "as much" if our core revolves around NLP and Digital Assistant vs. RPA?	RFO Scope Section 2.1 is not outlined in order of importance. See answer to Question 55.
105.	RFO Section 2: Scope	Which State Agencies are actively looking at implementing AI solutions? (TexcelVision / HUB Company - sales@texcelvision.com, 832 886 1280)	See answer to question 94. A specific listing of state agencies and their AI goals is not available at this time.
106.	RFO Section 2: Scope	Sology Solutions is a Systems Integrator and we read this RFO as lending itself more to the non-COTS as AI is an enabler and not necessarily a product/. How can we best propose our Systems Integration abilities in bringing elements of the integrated solutions from different players in our eco system and integrating and delivering a full solution that addresses the desired outcome as stated by your client?	System integration abilities can be outlined in the itemized pricing sheet using categories, sub-category, and resource descriptions along with their hourly rates. Respondent should use the forms provided to outline its history and experience within those areas outlined in the Section 2 Scope of the RFO.
107.	RFO Section 2: Scope	I gather you need companies that can provide a specific product ML, RPA, NLP, CV etc. Is that correct?	Respondent must be able to provide the products and services as outlined in RFO Section 2 Scope.
108.	RFO Section 2: Scope	We are a Services provider firm can DIR clarify if we qualify for this contract	See answer to question 101.

109.	RFO Section 2: Scope	Is the Request for Offer (RFO) for Artificial Intelligence (A.I.) Products and Services including operationalizing data models or is it looking for algorithms in their specific domain outside of RPA?	See answer to question 79.
110.	RFO Section 2: Scope	As we begin the journey into AI with state and local municipalities, have you identified how you will share state, national, and possibly larger sets of data? Have you identified a state based repository of information that we may be generally looking for and the definition of said data?	See answer to question 79.
111.	RFO Section 3.4 Historically Underutilized Businesses	What happens if your AI solutions (i.e. software) do not require any sub contractors?	Each respondent should decide how they can best fulfill the contract and shall complete the corresponding Good Faith Effort Method of the HUB Subcontracting Plan (HSP).
112.	RFO Section 3.4 Historically Underutilized Businesses	Can we change/modify HUB contractors and conditions during the term of contract?	Yes, once awarded a contract, the HSP can be updated.
113.	RFO Section 3.7.2 References	If I email to my references, will the reference responses be listed in VIS as they are received by DIR?	No. DIR recommends that Respondents ask references to cc the Respondent when the Reference submits the form to DIR.
114.	RFO Section 3.7.2 References	How many vendor references should be submitted?	DIR is requesting a total of three (3) references. Any additional references received beyond the first three (3) will not be considered.
115.	RFO Section 3.7.2 References	Do you require 3 references per category or 3 references total? Can we reuse references that we obtained for DBITS?	Three (3) references total. References must submit the reference form that is included with the AI RFO DIR-CPO-TMP-441.
116.	RFO Section 3.7.2 References	You mentioned needing 3 references. Is that 3 references per category (e.g. RPA) or 3 for the entire RFO?	See answer to question 114.

117.	RFO Section 4.1 Evaluation of Responses	What are requirements for Financial Review?	Respondents must provide their DUNS number. DIR's Chief Financial Office oversees the financial review based on the company's Dun & Bradstreet report.
118.	Terms and Conditions Section 7.14 DIR Cost Avoidance	In 7.14 of the Standard Terms and Conditions, please elaborate as to what is required in the report the DIR expects, specifically in terms of the pricing of services from alternative sources.	A revised Terms and Conditions is currently being developed; DIR anticipates changes to the referenced section along with other areas due to recently enacted legislation.

Posted October 12, 2021 as part of Addendum 4

#	RFO Section	Vendor Question	DIR Answer
119.	Attachment 1 Sample Contract	Attachment 1 Sample Contract section 8.1 Software License Agreement references "Appendix D Software License Terms." Should the Respondent include their software licensing terms with their response or are the terms provided during negotiation?	If the Respondent will require the DIR Customer to sign an Agreement(s), such as a Service Level Agreement or Software License Agreement (including SaaS), then the Agreement must be included with the Response. Such agreements are subject to DIR approval and shall not contradict or weaken DIR contractual terms. See RFO Section 3.7.1 Mandatory Response Contents item (g).
120.	Attachment 1 Sample Contract	Request for Offer (RFO) Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Attachment 1 Software License Agreement, Page 1 Would Appendix D in Attachment 1 (Software License Agreement) basically refer to the vendor's standard terms and conditions regarding right to use the SaaS?	See response to question # 119 .
121.	Attachment 1 Sample Contract	In regard to page 1 of Attachment 1 Sample Contract, will DIR please provide Appendix D, Software License Agreement and Appendix E, Service Agreement, for the bidder to review?	The Sample Contract is a sample of what the DIR contract may outline, including any agreements provided by the Respondent through their offer and approved of during the negotiations process.

122.	Attachment 2 Standard Terms and Conditions	RFO Section: Attachment 2 Stanard Terms & Conditions Page# 10.1. Indemnification QUESTION: In Section 10.1 (Indemnification) would you consider removing subsection "(i)" regarding any action or omission in connection with the execution or performance of the contract? Reason: This wording could include any and all types of acts or ommissions during performance which are normally considered 'performance breaches' which are normally subject to a Limitation of Liability. Section10.12 then excludes all "indemnities" - which would include performance breaches. In that case the LoL provision is "empty'.	Any exceptions that the Respondent wishes to make must be included per instructions found in Exhibit A Respondent Information , Item 12 Exceptions.
123.	Attachment 2 Standard Terms and Conditions	Request for Offer (RFO) Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Attachment 2, page 24 Please confirm the term "Services Agreement" in Attachment 2 Standard Terms and Conditions (see Section 10.10 and 10.11) refers to Appendix E in Attachment 1 (Service Agreement) as there is no definition in Section 3 (Definitions).	DIR confirms this assumption. Service Agreement mentioned in Attached 2 Sections 2.10 and 2.11 refers to the related Service Agreement to the Purchase Order. See RFO Section 1.3.1(b) Information Technology Acquisition.

124.	Attachment 2 Standard Terms and Conditions	Request for Offer (RFO) Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Attachment 2, Page 5 With respect to Section 4.9 of Attachment 2 (Data Location) - Please confirm this section is not intended to preclude a SaaS company from allowing limited, secured and controlled access/ability to view such data to a limited number of personnel outside the contiguous United States, only to the extent required for the development/enhancement of the SaaS or support for the SaaS users. Note that while the personnel may be located outside the contiguous United States, the servers and infrastructure are located within the contiguous United States (e.g. AWS, Google).	This interpretation is not correct. Section 4.9, Appendix A, prohibits all State of Texas Customer data from being accessed or viewed outside of the contiguous United States.
125.	Attachment 2 Standard Terms and Conditions	In Attachment 2, Standard Terms and Conditions, under Section 9.2.5 (A), the word 'Fee' is misspelled on the third line. Can we get this updated?	The correction will be made in future updates.
126.	Attachment 2 Standard Terms and Conditions	In Attachment 2, Standard Terms and Conditions, the last page and footers both refer to this document as Appendix A, however, the title of the document and the cover page have it as Attachment 2. Can we get this updated?	The Standard Terms and Conditions is Attachment 2 of this RFO and will be Appendix A of the Contract.
127.	Attachment 2 Standard Terms and Conditions	In regard to Attachment 2 Standard Terms and Conditions, may the bidder negotiate terms upon award and/or during the Negotiation phase?	Bidders may negotiate terms during the negotiations phase. Any proposed exceptions must be included with the Respondent's offer to be considered during the negotiation phase.
128.	Attachment 2 Standard Terms and Conditions	RFO: DIR-CPO-TMP-441 #3 RFO Section: Attachment 2 Standard Terms and Conditions Vendor Question: We understand that the contract provided by DIR creates an unlimited liability position due to backdoor indemnification provisions. Is DIR willing to negotiate on unlimited liability and cap the liability to a set amount?	See response to Question 122 .

129.	Attachment 2 Standard Terms and Conditions	Standard Contract Terms 7.13 Performance Review Meetings Will DIR consider adding a virtual meeting option for the meeting?	Yes. Virtual meetings will be considered.
130.	Exhibit I PDAA	Does this PDAA Exhibit I need to be filled out by us the vendor only or by all of my solutions partners? In addition to the VPAT and VADSIR requirements, vendors must complete the Exhibit I Policy Driven Adoption for Accessibility (PDAA) for Vendor Self Assessment for all solicitations.	The PDAA must be completed by the Respondent only, not the solution partners
131.	Exhibit A Respondent Information	Exhibit A Attachment 1 List of Respondent's Cancelled Contracts - are these customer contracts that should be listed or any contract? eg., an agreement with a partner company	Respondent shall include any contract that has been canceled prematurely.
132.	Exhibit A Respondent Information	RFO DIR-CPO-TMP-441, Exhibit A Respondent Information, (iii) Mandatory Response Contents table, page 5: The first item listed in this table is the Transmittal Letter and Executive Summary and neither of these have been identified in the RFO. Please review and provide clarification.	See Addendum 4 Item 2 . Exhibit A Respondent Information has been revised and the Transmittal Letter and Executive Summary have been removed from the Mandatory Response Contents. They may be included with your response and will be considered optional documents.
133.	Exhibit A Respondent Information	RFO Exhibit A, Pages 2-3 of 9, Letter f: "(f) If there are no exceptions, the Respondent shall explicitly state in the Microsoft Excel document "ABC_441_Exceptions.xlsx" that the Respondent takes no exception to any part of this RFO. " The above mentioned Excel document is not included in the posted .zip file of the solicitation; will the Excel document be provided at a later date? Or should exceptions be included in the proposal document itself?	See Addendum 4 Item 5 . An Excel spreadsheet has been included with this addendum for Respondents to enter their exceptions.

134.	Exhibit A Respondent Information	RFO DIR-CPO-TMP-441, Exhibit A Respondent Information, page 1: Can the DIR confirm or elaborate on what is required by no. 2, "Comptroller of Public Accounts Respondent Identification Number"? Can the DIR provide any guidance on how to find the "Respondent Identification Number?"	To find your Comptroller of Public Accounts Respondent Identification Number, visit: https://mycpa.cpa.state.tx.us/coa/search.do
135.	Exhibit A Respondent Information	This question is for DIR-CPO-TMP-441 Attachment 1, 2 and 3. Does the respondent need to submit any confirmation back (or resubmit Attachments 1-3) to DIR if no exceptions are being taken to Attachment 1, 2 and 3?	If there are no exceptions, the Respondent shall explicitly state in the Microsoft Excel Spreadsheet ABC_441_Exceptions.xlsx (see Item 5) that the Respondent takes no exception to any part of this RFO.
136.	Exhibit A Respondent Information	2. Exhibit A Respondent Information section 17.A.(iii) - The table does not list the required Manufacturer Reseller Authorization Letters. Should they be included as an appendix to a required document? If so, which one?	Manufacturer Reseller Authorization Letter requirements are outlined in RFO Section 3.5.1. Authorized Respondents. They are neither an attachment, exhibit or appendix to the RFO. They must be included with the Respondents offer as applicable to the products being offered.
137.	Exhibit A Respondent Information	Does the signature required in Exhibit A on page 8 also meet the signature requirement on page 9?	No.
138.	Exhibit A Respondent Information	In a previous submission, DIR changed the verbiage from 'Respondent' to 'Vendor' under question 2 in Exhibit A. Will that need to be updated this time around as well?	Please re-state this question. DIR is unable to determine what is being asked.
139.	Exhibit A Respondent Information	In Exhibit A under Section/Question 12, there is a paragraph under the exceptions table, which mentions the Standard Contract Terms and Conditions as Attachment 1, however, in the Solicitation files, the file name is labeled as Attachment 2. Can we get this updated?	Correction has been made. See Addendum 4 Item 2 .

140.	Exhibit A Respondent Information	In Exhibit A. on page 3 number 13 there is a question that ask weather or not VPAT/ACR or VADSIR documentation has been included in the proposal response. There is an option to confirm VPAT/ACR are not applicable to the technology or services offered. If we confirm that VPAT/ACR is not applicable will our proposal be kicked out? During the vendor conference call it sounded like VPAT/ACR document was required. From my discussion with my technology and services team it does sound like VPAT/ACR is not relevant to what we're proposing.	If the VPAT/ACR is not applicable to the solution that you are proposing, please indicate this in Exhibit A . See section 2.5.1 (a) and 2.5.2 for applicability.
141.	Exhibit A Respondent Information	DIR-CPO-TMP-441, Exhibit A, page 7 section xvii indicates that if we show a Texas Address as our Principle Place of Business that we qualify as a Texas Resident Bidder as defined in TAC 34 pert 1 Chapter 20. Can you provide more specifics to find the definition/qualifications of Texas Resident Bidder. We have not found the relevant language.	Section 2252.001(4), Texas Government Code, states that "Resident bidder" refers to a person whose principal place of business is in this state, including a contractor whose ultimate parent company or majority owner has its principal place of business in this state.
142.	Exhibit A Respondent Information	DIR-CPO-TMP-441, Exhibit A, page 7 section xvii. If a national company (not headquartered in Texas) has a large Texas office with a large number of Texas employees and the bulk of the services under this contract are expected to be provided by employees that reside in Texas, are we allowed to use our Texas office's address as our principle place of business?	The address should match the principal office address identified on the entity's registration filed with the Texas Secretary of State.
143.	Exhibit A Respondent Information	DIR-CPO-TMP-441, Exhibit A, Section 15 - Conflict of interest Disclosure. Is Affinity through spouse included in the conflict of interest disclosure related to Exhibit A or only Consanguinity?	Yes, disclosures should be made for relationships through both affinity and consanguinity.

144.	Exhibit A Respondent Information	DIR-CPO-TMP-441, Exhibit A, Section 15 - During the term of the contract a respondent may hire an employee that could meet the conflict of interest reporting threshold. What are the on-going reporting requirements around future employees that may serve on this contract?	Ongoing reporting requirements will be in accordance with Section 10.4(B)(xiii) and Section 10.8(B) of Appendix A , and with any other applicable law or rule.
145.	Exhibit A Respondent Information	Exhibit A Item 17a Checklist for the RFO p. 5 What, if any, formatting and page requirements apply to the Transmittal Letter and Executive Summary?	Transmittal Letter is limited to one (1) page. Executive Summary is limited to 1 page. There are no formatting requirements for these items. Also, see Addendum 4 Item 2 .
146.	Exhibit A Respondent Information	Addendum 1 Page 59 Slide lists mandatory response contents; This list differs from that listed in Exhibit A Item 17.A Checklist for the RFO. Can DIR confirm the complete list of Mandatory Response Contents?	Respondents should refer to the RFO and its Exhibit A for the complete list of mandatory response requirements.
147.	Exhibit B	Pertaining to Exhibit B - During the Pre-Bid conference, it was stipulated that Vendors should provide details pertaining to their experience with the proposed solution(s). However, within Exhibit B, there is not a question(s) requesting this information. Otherwise, Exhibit B is just requesting experience with DIR and other state purchasing contracts and the number of years the vendor has been selling the solution(s) proposed. Is this correct, or is there a specific area where vendors should be providing narrative describing their experience with the proposed solution(s)?	See Addendum 4 Item 3 . Exhibit B has been revised so Respondents can better showcase their experience in offering AI Products and Services.
148.	Exhibit B & Exhibit C	Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Do we submit separate exhibit B & C for each of the 6 AI sub-domains?	No, Respondents should only submit one (1) Exhibit B and one (1) Exhibit C. Each Exhibit would be comprehensive of entire offer across all domains.

149.	Exhibit B & Exhibit C	Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Exhibit B & C - Can we submit separate exhibits for each of the categories? Exhibit C - Can we submit 10 pages for each of the 6 categories?	See response to Question 148 .
150.	Exhibit B History and Experience	Reference - Exhibit B Question - Can a vendor use Federal Govt. projects in Exhibit B?	Yes.
151.	Exhibit B History and Experience	Reference - Exhibit B Question - Can a vendor use a local HUB sub's experience in Exhibit B Q# 3, 4 & 5?	No. Answers should speak to the Respondent's history and experience only.
152.	Exhibit B History and Experience	Reference: Exhibit B History and Experience question # 3 (page 1) Provide the number of years your company has sold the products/services requested in this RFO to Texas state agencies, local governments, independent school districts, and institutions of higher education. Question: Is DIR asking number of years specifically for each of the categories of Texas state agencies, local governments, independent school districts, and institutions of higher education?	No. Not for each category, but overall.
153.	Exhibit B History and Experience	Reference: Exhibit B History and Experience question # 4 (page 1) Indicate whether or not Texas state agencies, local governments, independent school districts, and institutions of higher education have purchased the products/services listed in this RFO from your company within the last 12 months. Question: Can the DIR please provide an acceptable 12-month range based on due date of the RFO?	This refers to the twelve months immediately preceding the due date for Responses.
154.	Exhibit B History and Experience	Reference: Exhibit B History and Experience question # 4 (page 1) If yes, provide the entity names, total sales, quantity sold, and discount % off list price. Question: For services only bidders is it acceptable to provide quantity as NA?	Respondents to services only categories must provide a unit of measure applicable to the services, i.e., hours, days, months, etc.

155.	Exhibit B History and Experience	Section 3.7.1 b) Exhibit B Respondent History and Experience asks for the company history. Beyond providing the respondent's history of providing products required for this RFO, are there other specific aspects of company history you are looking for respondents to address in this section?	See response to Question 147 .
156.	Exhibit B History and Experience	In regard to page 1 of Exhibit B History and Experience, considering AI is an emerging technology which the market has been slow to adapt, is the bidder correct in assuming that DIR would like to evaluate and score the bidder's past experience delivering the products/services requested in this RFO to commercial customers?	Responses may include narrative from both public and commercial experiences.
157.	Exhibit B History and Experience	In regard to page 1 of Exhibit B History and Experience, if DIR will evaluate and score the bidder's experience delivering the products/services requested in this RFO to commercial customers, where should the bidder include this information in the response?	See response to Question 147 .
158.	Exhibit B History and Experience	In regard to page 1 of Exhibit B History and Experience, where can the bidder provide a narrative describing capabilities for delivering the products/services requested in this RFO?	See response to Question 147 .
159.	Exhibit B History and Experience	In regard to page 1 of Exhibit B History and Experience, is the bidder correct in assuming that DIR will want to score bidders based on their capabilities to deliver the products/services requested in this RFO?	Yes, that is correct and it is the purpose of Exhibit B Respondent History and Experience . See response to Question 147 .
160.	Exhibit B History and Experience	In regard to page 1 of Exhibit B History and Experience, if the bidder's capabilities for delivering the products/services requested in this RFO will be scored, where should a narrative be provided to describe those capabilities.	See response to Question 147 .

161.	Exhibit B History and Experience	<p>Within Exhibit B, for these questions:</p> <ul style="list-style-type: none"> - Provide the number of years your company has sold the products/services requested in this RFO to Texas state agencies, local governments, independent school districts, and institutions of higher education. - Indicate whether or not Texas state agencies, local governments, independent school districts, and institutions of higher education have purchased the products/services listed in this RFO from your company within the last 12 months <p>Are you looking for data ONLY on Texas sales? Or for all purchases from state agencies, local gov't, school districts and higher ed; even those outside of Texas?</p>	The requested sales information can be for those listed entities either in the State of Texas or outside the State.
162.	Exhibit B History and Experience and Exhibit C Contract Marketing and Customer Support Plan	Can Exhibit's B and C be reformatted in any way as long as all of the questions are fields are still included verbatim?	Exhibits B and C formatting should not be changed.
163.	Exhibit C Contract Marketing and Customer Support Plan	Question regarding: Exhibit C, Section 6.b, Page 2 Please clarify the requirements of this section. Is it requesting information regarding the proposer's team or additional reference information? In regards to the comparison to the State's size and type, does this refer to the State as a whole or is it reflective of the size of any one eligible DIR customer?	Item 6.b. of Exhibit C is requesting information regarding the Respondent's team. It refers to the State as a whole (all eligible DIR customers).
164.	Exhibit D HSP Sample Form	Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Can we add sub-contractors after submitting the RFO? In case there are changes needed/required?	Once awarded a contract, the HSP can be amended as needed.

165.	Exhibit D HSP Sample Form	RFO DIR-CPO-TMP-441 EXHIBIT D, HUB PLAN QUESTION: CAN A VENDOR SUBMIT TO THE TX DIR HUB COORDINATOR A COPY OF THEIR HUB PLAN TO BE REVIEWED PRIOR TO SUBMITTAL OF RFO WHEREBY TO CHECK FOR COMPLIANCE?	Yes. Request for courtesy reviews can be sent to dir.hub@dir.texas.gov .
166.	Exhibit E Itemized Price List	RFO Section: Exhibit E, Itemized Price Sheet Page # 2. Products - VPAT/ACR (upload or provide Website Link) QUESTION: The requirement states that we need to upload or provide Website link to VPAT/ACR. Can we provide a complete Exhibit G Voluntary Product Accessibility Template (VPAT) for each product or service included in the submitted pricelist and refer the attachment/file name in the response column "VPAT/ACR (upload or provide Website link)"?	No. Please upload the documents as outlined in Exhibit E , Tab 1 Instructions.
167.	Exhibit E Itemized Price List	RFO Section: Exhibit E Itemized Price Sheet Page #: 2. Products - VPAT/ACR (upload or provide Website link) QUESTION: Can the vendor propose AI products for which the plan is to get VPAT/ACR in short term? If yes, then what response can you provide in lieu of providing VPAT/ACR to ensure that the response is compliant?	Respondent should include all VPAT/ACRs that are available at time of response.
168.	Exhibit E Itemized Price List	With respect to Page 21, Section 3.7.1, item e)... How do we specify/declare (in Exhibit E) an offering that consists of both products and related/corresponding services? For example, in order to be able to offer digital assistants/chatbots to DIR customers, we must customize and train the system (a service that we offer). However, the digital assistant technology infrastructure would require cloud resource credits (a product we resell) to offer flexible, usage-based payment.	Products and their associated services can be grouped or categorized as necessary within Tab 2 of Exhibit E Itemized Price List . If subcategories are necessary, a subcategory column can be added to the spreadsheet as long as it does not interfere with the formulas. If necessary, include narrative explanations in the product description column.

169.	Exhibit E Itemized Price List	Exhibit E: Itemized price sheet – We assume that tab 2 (products) must be filled only by the companies that offer AI Products. Kindly confirm.	Correct, Tab 2 must be completed only by Respondents wishing to offer products (brand software/hardware).
170.	Exhibit E Itemized Price List	Exhibit E: Itemized price sheet – Tab 3 services -- In the price sheet for services, we assume that the category name corresponds to the six listed categories (AI, ML, RPA, NLP, CV & Digital Assistant), and the service name would list various roles such as project management, Business Analysis, Technical Architecture, Development, Testing, Training, etc. Kindly confirm.	Respondent can use category column in whichever way necessary to outline their offerings and business model.
171.	Exhibit E Itemized Price List	Exhibit E: Itemized price sheet – Tab 3 services -- Under 'Additional Discount Based On Aggregate Sales', how would the original discount be calculated?	The original discount is proposed by the Respondent. The DIR Customer Price is then calculated as $MSRP \times (1 - \text{DIR Discount}\%) \times (1 + 0.75\%)$.
172.	Exhibit E Itemized Price List	3. Exhibit E Itemized Price Sheet - Do you permit the use of off-shore technical resources in order to reduce development and support cost?	See response to Question 119 .
173.	Exhibit E Itemized Price List	Request for Offer (RFO) Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Exhibit E Itemized Price Sheet and Exhibit H VPAT Should a COTS SaaS offer be listed as a Product or as a Service in Exhibit E (as SaaS is a Software as a Service, not a standard product)? Should ancillary services (such as training, expert consultancy, ancillary therapy services, etc.) be listed under Product or Service? In addition, please confirm that Exhibit H does not need to be completed for such type of ancillary services (i.e. not the type of services listed in Exhibit H).	COTS SaaS should be listed as products (software) in Exhibit E Itemized Price List and Exhibit G VPAT . Related services can be listed either under the product tab or service tab as long as it is clear they are associated with a specific brand. Exhibit H (VADSIR) must be completed for services described in section 2.5.1 (b) and 2.5.3.
174.	Exhibit E Itemized Price List	In regard to Exhibit E Itemized Price Sheet, will DIR consider offshore rates?	Yes.
175.	Exhibit E Itemized Price List	In regard to Exhibit E Itemized Price Sheet, does DIR require all supporting personnel to be US Citizens?	No. See response to Question 195 .

176.	Exhibit E Itemized Price List	In regard to the #2. Products tab in Exhibit E Itemized Price Sheet, considering cloud native AI tools can change price daily and differ in price by region, may the bidder provide links to maintained MSRP price lists from the manufactures from whom the bidder has reseller authorization, instead of completing the MSRP field?	No. Pricing must be included in the Itemized Price List if the Respondent wishes to offer it to DIR Customers.
177.	Exhibit E Itemized Price List	3.7. Response Format and Contents : E) Exhibit E Itemized Price Sheet. We assume that the DIR is expecting a fixed price model for the Services Price Sheet. Can we propose alternative options on "Unit of Measure" i.e., Hourly/monthly rates per person, agile pod pricing per month, etc.?	That is correct that a fixed price model should be used for the Services in Exhibit E Itemized Price Sheet . Services are typically outlined by resource description and hourly rate.
178.	Exhibit E Itemized Price List	Within the Itemized price sheet, there is not a way to indicate an incremental increase/adjustment to rates each year of the contract. Should additional line items be added for future years to indicate the adjustment? Or is there a place to indicate a % increase for each year of the contract?	The DIR contract would tie the Successful Respondent to the discount percentage offered. Changes to MSRP/list prices may be managed throughout the life of the contract by working with the assigned DIR contract manager.
179.	Exhibit E Itemized Price List	Will Exhibit E, the Itemized Price Sheet for each respondent be shared on the DIR website? Similarly, will the final rate card for each selected respondent be posted? We have noticed that some DIR contracts, but not all have posted rate cards and want to understand if this one will be shared.	The Itemized Price Sheet must be made available on the DIR vendor's contract Web page. See Attachment 2 Standard Terms and Conditions Section 7.2 Internet Access to Contract and Pricing Information.
180.	Exhibit E Itemized Price List	Pricing - we typically price using a consumption based model with minimum commitments. It appears the Volume Discount tab on Exhibit E is the most appropriate tab. Should we just do our best to apply our pricing model to that sheet and primarily use the Volume Discount Tab or do you have other suggestions?	The Volume Discount Tab is only for providing additional discounts on top of what has already been outlined in either Tab 2 Products or Tab 3 Services.
181.	Exhibit F : EDGAR Certifications	Exhibit F: EDGAR Certifications for DIR Vendors Form – this would be for us the vendor who is responding not our partner/manufacturer, correct?	Correct, the Exhibit F EDGAR Certifications should be completed by the Respondent only.

182.	Exhibit F EDGAR Certifications	In Exhibit F, EDGAR Certifications, do we need to add a comment to the Conflict of Interest Questionnaire if it is not applicable or is it okay to leave it blank?	The Conflict of Interest Questionnaire is a sample and the Respondent may leave it blank.
183.	Exhibit H VADSIR	Exhibit H - VASDIR, question 6 asks for links to example accessible system's we've created. Do these have to be AI specific systems, or can they be examples of any of our accessible development work?	They can be links to any of your accessible development work.
184.	Exhibit H VADSIR	Exhibit H - VASDIR, question 6 - Many of our solutions are not public-facing and our clients are unlikely to grant permissions for links or screenshots of their solutions. If we are unable to provide links here would this result in us failing the RFO?	If you are unable to provide links, please state the reason why. The VADSIR is evaluated based on the totality of the information provided, not upon a single question.
185.	Exhibit I PDAA	On the Exhibit I accessibility document, several "no" responses cells are shaded red. Would the use of any red response (even with a supporting explanation) result in the vendor failing the RFO?	No, a specific response in the PDAA will not result in failing the RFO.
186.	Exhibit J References	How many references are mandatory?	References are not mandatory.
187.	Exhibit J References	Would past performance and references from subcontractors be considered for evaluation?	References should be past clients, not subcontractors.
188.	Exhibit J References	Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Exhibit J Reference Form - Will a Release of Liability form be required, if so will DIR provide the forms for each reference?	There is no Respondent Release of Liability form required for this RFO.
189.	Exhibit J References	Reference - Performance reference Exhibit J Question - It says minimum of three experiences. Do vendors have to cover all categories we want to offer in these experiences, or can it be any three examples even if we want to bid for all?	This statement is incorrect as Exhibit J does not say "minimum of three experiences" within its document.

190.	Exhibit J References	Reference - Document - AI RFO DIR-CPO-TMP-441, Section 2.1.2 - 2.1.7 Question - 2. Are vendors limited to bidding on categories we provide references/experience for in proposal, or can we view/bid on other categories for which we do not provide references in our proposal if awarded?	References can be related to any AI products and services that outlined in RFO Section 2 Scope.
191.	Exhibit J References	Reference - Exhibit J "Quality of Artificial Intelligence Products and Services" Question - Do our customers only rate on AI products or services? If vendors are also bidding for other categories like RPA, ML, and Computer Vision. The customer will assume that only AI services are being considered and may not believe the vendor's other work is in scope of the request. Or does the reference to AI products and services encompass all categories in the RFO?	That is correct at AI products and services encompass all Scope categories outlined in the RFO Section 2 Scope.
192.	Exhibit J References	In regard to Exhibit J Reference Form, will DIR accept multiple references from the same organization or the same AI project or will this be considered non-compliant?	References must be from different organizations.
193.	Exhibit J References	Page 22, Section 3.7.2 (References) Can we use references for work done past two years back? The Exhibit seems to suggest that references are only valid if the work was done within the last two years...	No. The work must have been performed in the past two (2) years.
194.	Exhibit J References	One of our largest customers that purchases products and services from us through the DIR, informs us that it is against agency policy to complete the reference form requested in the RFO in Exhibit J. They have offered to instead provide a Letter of Good Standing on our behalf. If provided by our customer, would this letter be adequate to serve as one of our references?	No. The reference must use the form provided, Exhibit J Reference Form .
195.	General	Are offshore services allowed under this contract?	Yes, however see Standard Terms and Conditions Section 4.9 Data Location.

196.	General	If we are a nonUS company, can we participate as prime this RFO?	See response to Question 195 .
197.	General	If we are a nonUS company, can we participate as a sub for this RFO?	See response to Question 195 .
198.	General	Is a HUB coordinator at TXDIR available to review a vendors HUB plan to ensure for accuracy and full compliance?	Respondents may contact DIR's HUB Department at dir.hub@dir.texas.gov for assistance in completing their HUB Subcontracting Plan (HSP) up to ten (10) working days before the RFO submittal.
199.	General	When an customer (agency) procures through DIR for A.I., and a statement of work (SOW) is proposed, can the legal contract terms and conditions be modified or over-ridden for that particular opportunity by either the customer and/or by the vendor?	Customer can negotiate additional terms as long as they are not in conflict with the Contract or its Terms and Conditions.
200.	General	When will the Q&A from the Pre-Bid call be posted / other submitted questions?	Q&A from the pre-bid conference was posted in Addendum 3 to ESBD on September 16, 2021
201.	General	RFO DIR-CPO-TMP-441, Section 3.3 Schedule of Events/3.3.1 RFO Schedule, page 17: To enable Respondents to fully address all requirements, would the Department kindly consider a two-week extension to the submission deadline?	See Addendum 4 Item 1 for revised schedule.
202.	General	RFO DIR-CPO-TMP-441, Addendum 1, item 3. Pre-Proposal Conference Video, page 2: The video link is for DIR-CPO-TMP-560. Please review and provide a link to the video for DIR-CPO-TMP-441.	Corrected link is provided in Addendum 2, Item 2.
203.	General	Can we resell products via this contract?	Yes.

204.	General	Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Section 3.3.1 - Deadline for submitting Questions - Would DIR consider extending this date to Tuesday September 14, 2021 Section 3.3.1 - Deadline for submitting responses to RFO - Would DIR consider extending the date by a few days due to the loss of a work day from Labor day?	See response to Question 201 .
205.	General	Reference DIR-CPO-TMP-441. Can DIR cite several examples of A.I. and/or M.L. that DIR clients would like implemented? It would be beneficial to gain knowledge of A.I. and/or M.L. in high demand	Some examples of organizations providing data on this emerging technology includes the National Artificial Intelligence Initiative, (www.ai.gov), U.S. Government Accountability Office (GAO) (https://www.gao.gov/products/gao-21-519sp), and DIR AI Center of Excellence. (https://dir.texas.gov/enterprise-solution-services/artificial-intelligence-ai-center-excellence)
206.	General	Reference DIR-CPO-TMP-441. Will DIR provide points of contact (POC) within each DIR client, to assist awarded contractors, the ability to directly market to each DIR client?	Yes, DIR will provide a new vendor orientation session to assist Successful Respondent in marketing to DIR Customers.
207.	General	1. RFO Section 3.6 Response Deadline and Submission Requirements - Does DIR have a preference as to font, format, and file type of the response?	No, there is no preference as to font and format. Respondent should follow RFO directions in regards to file type where prescribed.
208.	General	Reference - General Question - Can a vendor bid as Prime as well as a sub also? If yes, can a vendor bid as sub on multiple teams?	Yes.
209.	General	This is just a generalized question that we could not find in the RFO, specifically under Section 3.7 of the RFO, Response Format and Contents. Is it acceptable to use Times New Roman 11 pt for text and Arial Narrow 9 pt for tables and graphics?	Yes.

210.	General	Can DIR define "Co-op" as stated in the RFO, "Respondent must propose to make sales either directly through a Co-Op Contract or through a Co-Op Contract with a designated qualified dealer or reseller."	See RFO Section 1.3.1 (b) Information Technology Acquisitions. "Co-op Contract" is defined as Cooperative Contract. Information regarding the Co-op Contracts Program is located on DIR's Web site at http://dir.texas.gov/View-About-DIR/Pages/Content.aspx?id=41 .
211.	General	In regard to Addendum 2 Q&A #7, if the bidder's narrative about experience and/or methodologies for delivering the products/services requested in this RFO must be included in the 2 page requirement for the question, "1) In no more than two (2) pages, provide a detailed history of your company.", would DIR consider revising the question and extending the page limit for this response in an addendum?	See response to Question 147 .
212.	General	DIR-CPO-TMP-441 general question - Does DIR have an estimated or targeted dollar amount of net fees for this AI contract program (that is, program wide across all successful respondents and categories). Can those estimates be shared in any detail (e.g., by category or sub-category or by software vs. services)?	See RFO Section 1.3 Background. Successful Respondent will work directly with DIR customers to determine customer needs.
213.	General	DIR-CPO-TMP-441 general question There are a few references to the fact that our pricing will be public information. The FAQ indicates that existing AI related services may have already been contracted (E.g., RPA work under the DBITS contract). How can we find the contracted rates associated with that and similar related contracts.	All active DIR contracts can be found on the DIR Website https://dir.texas.gov/ . Searches for contracts awarded under a specific solicitation can be made by entering in the RFO number in the contract search field.

214.	General	In regard to Addendum 2 Q&A #48, would DIR please confirm if the answer to question 48 is indeed a 1-page limit for the transmittal letter and a separate 1-page limit for the executive summary? If so, does DIR plan to update the RFO in an addendum to reflect these instructions?	Response to Addendum 2 Q&A #48 is correct. See response to Question 132 .
215.	General	3.3.1 RFO Schedule p. 15 Will the State consider an extension of 2 weeks making the closing date October 12, 2021?	See response to Question 132 .
216.	General	1.2. Purpose p. 1 What prompted this RFO? Was it overwhelming demand by state agencies and local governments for these products, dissatisfaction with existing solutions, etc.? Are certain agencies and local governments looking for specific solutions?	See RFO Section 1.3.1. Information Technology Acquisition
217.	General	Addendum 1 Page 8 The slide provides historical sales (DIR Cooperative Contract Program Sales) for the last 3 years. Are there estimates on projected sales for 2021?	There is an estimated 25% increase for 2021 sales.
218.	General	Exhibit C 4 Can DIR provide an estimate of expected total sales of the services listed in this RFO across all eligible DIR Customers within the next twelve (12) months?	No. That information is not available.
219.	General	Addendum 1 Page 14 The slide provides evaluation criteria. How will the DIR score pricing when comparing multiple vendors providing a combination of solutions with varying degrees of complexities and capabilities comprised of a mixture of COTS, non-COTS, and T&M pricing?	Evaluations of services are based on the merits of the Respondents offer and are not scored by comparing one to another. The DIR customer will make the final determination and analysis of pricing for services.

220.	General	Addendum 2 response 5 stats that VPAT is for COTS only. However, response 33 indicates that VPAT is also required for "If the proposal includes software ... or services...". Due to the nature of the VPAT form we assume this is misleading and that response 5 is accurate for vendors offering only software services?	DIR requires vendors proposing Commercial Off the Shelf (COTS) products, including Software as a Service (SAAS), to provide Accessibility Conformance Reports (ACR) created by using a VPAT. If the proposal includes software, hardware, or services that have a user interface for access by the public or employees of state agencies and institutions of higher education then a VPAT is required to be submitted with the response to RFO.
221.	General	Is there a specific Code of Federal Regulations compliance requirement?	This question is not clear.
222.	RFO 1.3 Background	DIR-CPO-TMP-441 • Is the client expecting to use existing cloud ML solutions like Dialogflow for chatbot, Google OCR for character recognition etc. or looking for solutions to be developed from scratch using open-source technologies? • Does the customer have cloud-based datacentre for storing their data?	The specific needs of the DIR Customer will determine the details of the requirements. See RFO Section 1.3.1 Information Technology Acquisition
223.	RFO 1.3 Background	Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Exhibit E - Itemized Price Sheet Pricing of Products and Services are to be provided for the solutions mention under section 2.1.2 -2.1.7, these products or services can be vendors own 'IP' as well, pls. clarify? Can the delivery consist of onshore and offshore delivery mix? For proposed products do we need to include one-time SW setup cost as well as ongoing operational support cost?	See response to Question 222 .
224.	RFO 1.3 Background	Is an AWS hosted data labeling solution (US-based) a viable solution or is an on-premise solution required?	See response to Question 222 .
225.	RFO Section 1.2 Purpose	How many vendors do the DIR plans to empanel as part of the required services?	There is no pre-determined number beyond "one (1) or more." See RFO Section 1.2 (b) Purpose.

226.	RFO Section 2 Scope	Do we need to have capabilities in all 4 areas to bid here?	No.
227.	RFO Section 2 Scope	2.1.1g - Would eventual SOWs be limited to the categories we bid for, if we are to win?	The resulting awards Appendix C Pricing will define the scope of the Successful Respondent's contract.
228.	RFO Section 2 Scope	General Question: Is it acceptable to submit a response for AI services only or are vendors required to propose both AI products and services?	Offers may be comprised of either product, services, or both.
229.	RFO Section 2 Scope	RFO page 5, Section 2. Scope: Given the capabilities of artificial intelligence and machine learning require information assets to be digital, can periphery services related to an overall AI/ML initiative be included in our response? For example, the periphery services required for an AI initiative could include document scanning, indexing, records storage and secure destruction in addition to the AI technology and services. Is it acceptable to include these services in our response?	See Addendum 4 Item 2. This revision adds Ancillary Services to Section 2.1 Scope.
230.	RFO Section 2 Scope	Have question regarding product applicability: 1. Does biometric access control (that uses narrow AI to recognize people identity, and do background check thru national database/driver license) apply to this RFO? Here is the product link: https://canamwireless.com/automated-ai-rapid-temperature-screening-system/ 2. Does DashCam that has AI to detect distracted driving apply to this RFO? link to the product: https://surfsight.com/ Thank you for your guidance!	It appears that the products in question would fall under RFO Scope Section 2.1.6 Computer Vision (CV).
231.	RFO Section 2 Scope	Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 What is the support window to be considered, e.g. 8x5, 16x5, 24x5, 24x7?	See response to Question 222 .

232.	RFO Section 2 Scope	Under scope Artificial Intelligence (AI) 1. Fraud Detection- Pg 6 - Please provide the scope, data sources, Applications V. AI Solutions and Deployment-What are the solutions that are deployed? and where are they hosted -on cloud or on premise. X Error Checking- could you provide the scope on this? HUB Subcontractor- Does DIR have a directory of HUB vendors that are available for us to subcontract?	See response to Question 222 .
233.	RFO Section 2 Scope	Page 6 - RFO Section 2.1.1 (c) states "Preferably, services provided would be able to assist the Customer through all phases in the AI life cycle, from design and development through deployment and continuous monitoring." Does this statement mean that vendors that do not provide deployment and implementation services (e.g., strategy-focused firms) may potentially be assessed and subsequently evaluated less favorably than vendors that support the entire life cycle, as the statement implies?	Yes.
234.	RFO Section 2 Scope	1)Can the DIR share any use cases of AI services being used currently by any agency? 2)Can we also include services that typically complement an AI service workflow, based on our experience with similar agencies?	Some examples of organizations providing data on this emerging technology includes the National Artificial Intelligence Initiative, (www.ai.gov), U.S. Government Accountability Office (GAO) (https://www.gao.gov/products/gao-21-519sp), and DIR AI Center of Excellence. (https://dir.texas.gov/enterprise-solution-services/artificial-intelligence-ai-center-excellence). Proposed services must be within Scope outlined in RFO Section 2.

235.	RFO Section 2 Scope	DIR-CPO-TMP-441 Request for Offer, 1.2.b As a result of this RFO, DIR expects to receive and evaluate Responses and select one (1) or more qualified Respondents with whom to enter into negotiations. Section 4 Evaluation, Negotiations, and Award of this RFO contains more information regarding evaluation and Respondent selection process. All contract(s) awarded shall be indefinite quantity contracts with no minimum guarantees of any purchases. Question: Is it required to respond to every category or will the state make unique awards for each capability?	See RFO Section 2.1.1.(g) Respondents are encouraged to bid any or all or any combination of the categories listed below. Responses may include one (1) or more of the products or services outlined in this Section 2.1.
236.	RFO Section 2 Scope	2.1.2 Artificial Intelligence (AI). Are pure cloud SaaS offerings suitable?	Yes.
237.	RFO Section 2 Scope	Since many large agencies will have significant volumes of physical records for large-scale digitization projects for the AI/ML process, would it be acceptable to also include our physical records storage, secure shredding and data center services as part of a comprehensive scope of offerings for an AI client? Our intent is to help agencies digitize, automate and obtain key insights all of their vital information assets, including information that may be analog today. Our related services (records storage, data center services, back-up and secure destruction) may be required by DIR clients as part of a comprehensive solution.	See Addendum 4 Item 4 . This revision adds Ancillary Services to Section 2.1 Scope.
238.	RFO Section 2.5 EIR Accessibility	RFO 2.5 If a single product is comprised of multiple modules (which can be purchased separately) does each module require a unique VPAT?	Applicable VPATs are required for each product or product family in the pricelist.

239.	RFO Section 2.5.1 (c) 2.5.1 EIR Form Applicability	Letters of Authorization (LOAs): We submitted VPAT's but this mentions a PDAA. This is the first I'm seeing of this as I don't remember it being part of the original package. If we submitted the necessary VPAT's and VADSIR questionnaire, do we need to submit a PDAA?	Yes, see Section 2.5.1. (c) c) ..."In addition to the VPAT and VADSIR requirements, vendors must complete the Exhibit I Policy Driven Adoption for Accessibility (PDAA) for Vendor Self-Assessment for all solicitations. "
240.	RFO Section 2.5.1 EIR Form Applicability	In section 2.1 of the RFO doc, which offerings (AI, machine learning, RPA, NLP, Computer Vision, Digital Assistant) would require a VADSIR? The qualifications for a VADSIR ("Custom development services as part of an integrated solution") can be interpreted in many ways.	VADSIR requirements may apply to any of the technologies outline in the RFO Section 2 Scope. To determine the applicability of the VADSIR, see RFO Section 2.5.1 EIR Form Applicability, Item (b).

241.	RFO Section 2.5.2 VPAT Submission and Review – COTS Offerings	<p>Regarding 2.5.2 VPAT Submission and Review – COTS Offerings</p> <p>As part of our response we will be featuring a family of COTS products from a manufacturer as we are a certified reseller of their products. This manufacturer has provided us a link to their latest ACR which we will provide as part of our response. Upon review of their ACR, we noticed that certain components within the family of products are noted as either not being tested or passing certain accessibility tests.</p> <p>The RFO states: “Vendors that submit incomplete ACRs or are unable to provide or obtain ACRs for products it manufactures or for products from manufacturers it represents offered in its Response, and ACRs are determined to be applicable, may be required to submit a letter to be posted on DIR’s vendor contract web page, stating that the some or all accessibility documentation status of products may be missing, or not the result of accessibility testing, or may be disqualified from this solicitation.”</p> <p>Q1: Should the referenced “letter to be posted on DIR’s vendor contract web page” be submitted as part of our response?</p> <p>Q2: Are we disqualified if we submit ACRs for manufacturers’ products which do not meet accessibility requirements?</p> <p>Q3: Can you provide us an example (or a link to an example) letter which will be posted on our DIR vendor contract web page?</p>	<p>Q1. Respondents may be required to submit a letter. DIR will request a letter if it is required.</p> <p>Q2. Respondents are not automatically disqualified if the ACRs submitted demonstrate that some features do not meet accessibility requirements.</p> <p>Q3. As of 9/30/21 there is not an example of a letter posted on a DIR contract holder’s webpage.</p>
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242.	RFO Section 2.5.3 VADSIR Submission and Review	Reference: RFO DIR-CPO-TMP-441: 2.5.3 VADSIR Submission and Review – non-COTS Offering & Exhibit A Respondent Information (pages 12 & 5) The RFO indicates “Vendors that claim their offerings are exempt from accessibility requirements should include a statement in the VADSIR that they are not offering development services.” However, in Exhibit A on page 5 within the table the VADSIR is indicate as if applicable. Question: Would the DIR still like a VADSIR submitted for vendors who are only offering services? In which case the VADSIR would not be applicable.	Please include a statement in the VADSIR that it is not applicable and answer the question in Exhibit A Respondent Information.
243.	RFO Section 3.3 Schedule of Events	Would DIR consider extending the proposal due date by 2 weeks?	See Addendum 4 Item 1 for the revised RFO Schedule.
244.	RFO Section 3.4.1 HUB Subcontracting Plan	RFO Section: AI RFO DIR-CPO-TMP-441 PAGE #: 3.4.1 HUB Subcontracting Plan QUESTION: Is it mandatory to attach HUB certificates to our HUB plan as part of response to TX DIR?	No.
245.	RFO Section 3.4.1 HUB Subcontracting Plan	Will other state approval of HUBs be acceptable to meet the RFO’s HUB goal and requirements?	DIR only recognizes State of Texas HUB certification.
246.	RFO Section 3.4.1 HUB Subcontracting Plan	Will federally-approved HUBs be acceptable to meet the RFO’s HUB goal and requirements?	DIR only recognizes State of Texas HUB certification.
247.	RFO Section 3.4.1 HUB Subcontracting Plan	Does the HUB Goal apply uniformly to all proposed products (e.g., software, hardware) and services (e.g., implementation, sustainment)?	The HUB Goal is applicable to the contract and throughout the life of the contract, inclusive of all total sales under the contract.

248.	RFO Section 3.4.1 HUB Subcontracting Plan	DIR-CPO-TMP-441 general HSP question - We have internal resources capable of performing all the services we plan to bid on and we believe we can submit a passing HSP using that approach. We may have also identified a HUB business that we would be willing to partner with in order to support the DIR's HUB target for this RFO. Materials indicate the HSP is a pass/fail item. If we choose to subcontract to a HUB, are there any benefits in how our response will be scored (assuming both approaches would meet the pass the pass/fail threshold). Similarly, are there benefits or incentives based on how our potential customers may be incented to select us based on our HUB approach?	The respondent will determine how they can best fulfill the contract and complete the HSP accordingly.
249.	RFO Section 3.4.1 HUB Subcontracting Plan	3.4.1 HUB Subcontracting Plan p. 17 We understand the necessity of submitting a HUB Subcontracting Plan (HSP), even if we do not plan on subcontracting. Do vendors that choose to subcontract with HUBs in their HSP get a preference over vendors not subcontracting in the HSP, when DIR evaluates the proposals?	The HSP is a pass/fail item.
250.	RFO Section 3.7.1 Mandatory Response Contents	RFO DIR-CPO-TMP-441, Section 3.7 Response Format and Contents, page 20: In other RFOs released by the Department a specific file naming convention has been identified. Please review and identify whether the Department recommends a file naming convention for this RFO.	DIR recommends that the file name be concise, both clear to its contents and short.
251.	RFO Section 3.7.1 Mandatory Response Contents	This is just a generalized question that we could not find in the RFO, specifically under Section 3.7 of the RFO, Response Format and Contents. What format should the file names be following for this solicitation?	See response to Question 250 .

252.	RFO Section 3.7.2 References	RFO DIR-CPO-TMP-441, Section 3.7.2 References, page 22: In other RFOs a "Respondent Release of Liability" exhibit has been included along with the customer reference form. Please review and identify whether the Department will be requiring a liability form for this RFO.	See response to Question 188 .
253.	RFO Section 4.1 Evaluation of Responses	Pages 23-24, Section 4.1 (Evaluation of Responses) The text states "The financial review is a pass/fail determination that is final. Only Responses that receive a passing grade will proceed to the evaluation committee." What is the criteria for pass/fail determination in the financial review?	Respondents must provide their DUNS number. DIR's Chief Financial Office oversees the financial review based on the company's Dun & Bradstreet report. A financial fail will result if a D&B report's Supplier Evaluation Risk (SER) Rating indicates that the Respondent's company is high risk or if there is no DUNS number provided.
254.	RFO Section 4.1 Evaluation of Responses	How will DIR score newly registered users who do not have a score or experience in the Vendor Performance System?	A Respondent's Vendor Performance System grade does not affect their evaluation score, however see RFO Section 4.2.1 Item 2 regarding Pass/Fair Criteria.
255.	RFO Section 4.2.2 Weighted Evaluation Criteria	Is there any additional weightage for responding to all six categories versus responding to only a few of them?	This question is not clear.
256.	RFO Section 4.2.2 Weighted Evaluation Criteria	4.2.2 Weighted Evaluation Criteria p. 24 How will the state compare and evaluate unique service and product offerings between vendors?	Responses are scored on their own merits using the criteria outlined in RFO Section 4.2.2. Weighted Evaluation Criteria. Responses are not evaluated on their comparison to each other.
257.	RFO Section 4.2.2 Weighted Evaluation Criteria	4.2.2 Weighted Evaluation Criteria p. 24 Does the State of Texas provide preference to vendors that are headquartered/resident in Texas? Does being registered and in good standing with the CPA Franchise Tax Office put all vendors, all other things being equal, on the same footing?	This RFO does not score on the basis of the company's location.

258.	Service Agreement Template	Request for Offer (RFO) Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Attachment 3 Service Agreement Template, Pages 1-3 Please confirm Attachment 3 is only a sample for a Services Agreement, and per Section 3.7.1(g) of Attachment 2, the vendor should submit its own Service Agreement, if applicable (i.e. its standard terms and conditions for SaaS and ancillary services). Assuming this is confirmed, (a) should the vendor provide the actual documents, or a hyperlink (if these documents are available on its website) and (b) would this be Appendix E in Attachment 1 (Service Agreement)?	That is correct that Attachment 3 is only a sample. The Respondent may provide their include their own agreement if they already have one that requires a DIR Customer signature or, in cases where the Respondent is offering services, we will include the sample Service Level Agreement, as part of the DIR contract Appendices.
259.	Threshold and SOW Requirements	Request for Offer (RFO) Artificial Intelligence (AI) Products and Services DIR-CPO-TMP-441 Page 10, Section 2.4, Subparagraph (a) We understand that Texas Customers using the Cooperative Contracts are exempt from preparing competitive solicitations. Does the same apply to Customers from other States who have signed an agreement with DIR?	No.

END