

Request for Quotation

Professional Services for Software Test Automation Roadmap

March 2022



SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO

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I. INTRODUCTION

The School Employees Retirement System of Ohio (SERS) is requesting quotations from qualified professional services organizations with experience in software test automation.

II. BACKGROUND

SERS is a statewide defined benefit retirement system for non-certificated persons employed by the public schools within the state's cities, villages and counties, as well as local districts, vocational and technical schools, community colleges, and The University of Akron. Benefits include service retirement, disability and survivor benefits, and access to health care coverage for benefit recipients and their dependents. General administration and management of the plan is vested in the Retirement Board established under [Chapter 3309](#) of the Ohio Revised Code.

Links are available for the most recent [SERS Annual Comprehensive Financial Report](#).

The SERS QA team is a team of 3 individuals supporting a monthly software deployment cycle as well as other testing needs. The vast majority of our testing is manual and it is difficult to keep pace with the testing cycle let alone build, maintain, and execute any formal regression testing. We currently have a small suite of smoke tests in Ruby/Cucumber and we have begun developing a regression suite as well. The purpose of this engagement is to evaluate our existing automation processes and tools and provide guidance on how to improve the test automation environment and practices with the goal of performing regular regression tests.

III. SCOPE OF SERVICES

SERS is seeking a qualified vendor to provide professional services to assist the SERS Quality Assurance (QA) team in developing the following:

- Improvements to the QA test automation roadmap
 - Evaluate the current automation environment, test tools, and practices
 - Present a strategy for developing a regression testing suite, along with long term maintenance
 - Present a strategy for creation of a continuous integration environment to execute on demand automated tests similar to:
 - Jenkins web based front end
 - Initiate Ruby/Cucumber test

- Present test results
- Re-run any failed test
- Provide guidance and direction on an implementation plan
- Create roadmap for improvements to testing environments, test practices, or automation tools for regression testing

SERS will consider only quotations for the services as described above.
Responses submitted for other services will not be considered.

IV. QUOTATION SUBMISSIONS

A. Intent to Respond

If the vendor intends to respond to this RFQ, a Notice of Intent to do so should be sent to SERS by April 05, 2022. The Notice should be sent by email or fax to the SERS contact listed in Paragraph C. below, and contain the vendor's name, its intent to respond, the name of a contact person and the contact person's telephone number, email and fax number. Submitting this Notice will not obligate a vendor to submit a Response nor be a prerequisite for submitting a Response, but will allow SERS to send out any necessary information to interested vendors.

B. Response Deadline

The completed Response must be received by **April 19, 2022, 4:00 p.m., Eastern Time**. Responses received after the Response deadline will not be considered.

C. Delivery

Contact person for all responses, and communications:

David Greer
Senior Manager, IT Services
Information Technology Department
School Employees Retirement System
300 East Broad Street, Suite 100
Columbus, OH 43215
dgreer@ohsers.org
Telephone: 614-340-1184
FAX: 614-340-1189

Response is to be sent by email to the contact person above. An unbound printed original of the Response will be accepted if sent by

mail or delivery service and received by the deadline above. Faxed transmissions are not acceptable and will not be considered.

D. Response Documents

All of the following documents must be submitted together and in the order listed.

1. A Cover Letter submitting the vendor's Response on the vendor's letterhead signed by at least one individual who is authorized to bind the vendor contractually.
2. The Questionnaire in Appendix A. with the question and/or request duplicated in the Response before the answer or response.

E. Submitted Responses

Any Response submitted will become the property of SERS. SERS reserves the right to retain all Responses submitted, and use any information contained in a Response except as otherwise prohibited by law. **All Responses and the contents thereof will be deemed to be a public record which is open to public inspection after a vendor has been selected and contract has been executed, if any.** A vendor may include one additional copy of its Response with any proprietary trade secret information redacted and marked as such with a brief written basis as to why it believes the information is protected from disclosure. In the event that SERS receives a public records request to which, in SERS' sole discretion, any of a vendor's materials are responsive, SERS may release the vendor's redacted materials, or in the event no redacted materials are submitted, the vendor's unredacted materials without notice to the vendor. In the event any of the vendor's redactions are challenged, the vendor shall have sole responsibility to defend such redactions at its cost and expense. SERS will not institute any legal action to defend any of vendor's redactions, but will notify the vendor of such challenges.

F. Communications with SERS

Vendors which intend to submit a Response should not contact any member of SERS Staff or members of the Retirement Board. An exception to this rule applies to vendors who currently do business with SERS, but any contact made by such vendor(s) with persons should be limited to that business, and should not relate to this RFQ.

G. Questions Relating to this RFQ

All questions concerning this RFQ must be received in writing by

email or fax by the Contact person by **April 08, 2022, 4:00 p.m., Eastern Time**. Answers to only emailed or faxed questions received by this deadline will be available to all vendors by a posting at www.ohsers.org. Questions submitted after 4 p.m. April 08, 2022 or other than by fax or email will not be considered.

V. SELECTION PROCESS

SERS staff will evaluate all timely and complete Responses. SERS reserves the right to request that any Response be clarified or supplemented.

Vendor will be selected based upon Response to this RFP. The criteria for selection will include, but are not limited to the following:

- Vendor experience with similar services
- Completeness of response to Scope of Services defined above
- Cost

VI. TENTATIVE TIMETABLE

The following is the tentative time schedule for SERS' search for vendors to provide the requested services. All dates are subject to modification by SERS without prior notice.

Issuance of RFQ:	March 31, 2022
Question Deadline:	April 08, 2022
Response to Written Questions:	April 12, 2022
RFQ Response Deadline:	April 19, 2022, 4:00 p.m.
Vendor Selection:	April 22, 2022
Projected Commencement Date:	May 02, 2022
Project Completion Date:	June 15, 2022

The vendor selected must enter into a contract.

VII. QUESTIONNAIRE

Vendors must complete the Questionnaire appearing in Appendix A. Responses to the questions should repeat the question and be answered in order. Limit each response to no more than one-half page.

VIII. TERMS AND CONDITIONS

SERS makes no representations or warranties, expressed or implied, as to the accuracy or completeness of the information in the RFQ and nothing contained herein is or shall be relied upon as a promise or representation, whether as to the past or the future. The RFQ does not purport to contain all of the information that may be required to evaluate the RFQ and any recipient hereof should conduct its own independent analysis of SERS and the data contained or referenced herein. SERS does not anticipate updating or otherwise revising the RFQ. However, this RFQ may be withdrawn, modified, or re-circulated at any time at the sole discretion of SERS.

SERS reserves the right, at its sole discretion and without giving reasons or notice, at any time and in any respect, to alter these procedures, to change and alter any and all criteria, to terminate discussions, to accept or reject any Response, in whole or in part, to negotiate modifications or revisions to a Response and to negotiate with any one or more respondents to the RFQ.

SERS is not and will not be under any obligation to accept, review or consider any Response to the RFQ, and is not and will not be under any obligation to accept the lowest offer submitted or any offer at all. SERS is not and will not be under any obligation to any recipient of, or any respondent to, the RFQ except as expressly stated in any binding agreement ultimately entered into with one or more parties, either as part of this RFQ process, or otherwise. Any decision to enter into a binding agreement with a respondent to this RFP is in SERS' sole discretion

This RFQ is not an offer but a request to receive a Response. SERS will consider a Response as an offer to develop an agreement based upon the contents of the Response. Respondents agree that the contents of their Responses are valid for one year from the date of submission. SERS will not be liable for any cost incurred in the preparation of a Response and will not reimburse any respondents for their submission. Expenses related to the production of a Response are the sole responsibility of the respondent.

Appendix A

QUESTIONNAIRE

Responses to the following questions should repeat the question and be answered in order. Limit each response to no more than one-half page.

A. Vendor Name, Address, and Contact Information

- Name, Address, and Contact Information
- One or two references for similar services

B. Personnel

- Name, title, and brief, relevant background

C. Proposed services in response to the Scope of Services above

D. Standards of Conduct

1. Does the firm have a written anti-discrimination policy? If so, attach a copy and state how the policy is monitored and enforced.
2. How does the firm identify and manage conflicts of interest?
3. Are there any potential conflicts of interest that the firm would have in providing the requested services to SERS? If yes, explain.
4. List and describe any relationships and/or contacts the firm or its officers or employees have had with any SERS Retirement Board member and/or staff member within the last 12 months.
5. Has the firm or any officer or employee given any remuneration or anything of value directly or indirectly to SERS or any of its Retirement Board members, officers, or employees? If yes, identify the recipient and remuneration or thing of value. Additional information on the Ohio ethics law in this area may be found at: [http://www.ethics.ohio.gov/Retirement System Information Sheet.html](http://www.ethics.ohio.gov/Retirement_System_Information_Sheet.html).
6. Has the company or any officer, principal or employee given any remuneration or anything of value such as a finder's fee, cash solicitation fee, or fee for consulting, lobbying or otherwise, in connection with this RFQ? If yes, identify the recipient and remuneration or thing of value.
7. Within the last five (5) years have any of the following:

- a. Been or filed against the company or any officer or employee?
 - i. A judicial complaint related to the provision of the services
 - ii. Any governmental regulatory agency charge
- b. Been conducted against the company or any officer or employee?
 - i. Any governmental regulatory agency inquiry, or investigation
- c. Been filed by the company?
 - i. A claim to the company liability insurance carrier involving the type of services sought under this RFQ.

If yes to any of the above, describe the event and the current status or resolution; include any case citation.

E. FEES

Fixed fee, or hourly rate and estimated hours, for services proposed above.