

Case Study: Indiana Department of Revenue (DOR), Single Imaging Vendor Procurement

CHALLENGE

As part of its modernization efforts, the State of Indiana, Department of Revenue (DOR), sought to contract with one vendor to handle all of the department's imaging needs. At that time, the Department used two imaging vendors, one to handle the processing of financial documents; the other was used to capture return data. The Department determined that it would be more efficient for one vendor to provide both of these services.

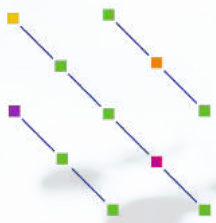
PROBLEM

The Indiana DOR prides itself on the quality of services it provides to Hoosiers. To build upon the Department's past success and ensure that it continued, the Department instituted "NextDOR," in 2017 to transform the department's systems and service delivery model. This project was designed to enable Hoosiers to manage their state taxes in one convenient system, 24 hours a day/7 days a week. Any recommendations to changing imaging vendors also had to take into account how the change would impact the NextDOR effort.

SOLUTION

The DOR engaged netlogx to manage the effort to procure one vendor to handle all of the Department's imaging needs. As part of this procurement effort, netlogx:

- Provided project management oversight and developed a schedule that encompassed required project steps, deliverables, milestones, and deadlines
- Conducted an executive-level Visioning session to accurately identify the Department's vision, which served as the foundation for ensuing procurement activities
- Researched the DOR's existing imaging contracts and related service operations
- Interviewed DOR subject matter experts (SMEs) to identify existing pros and cons and desired imaging enhancements, identifying more than 500 imaging services requirements
- Researched imaging services used in other Indiana and comparable state departments to identify industry best practices
- Conducted a pricing analysis of comparable procurements to estimate the costs of services
- Collaborated with the Indiana Department of Administration (IDOA) and DOR Procurement staff to develop and publish an RFP for imaging services



SOLUTION (Continued)

- Facilitated vendor Question & Answer (Q&A) process
- Developed a “scorecard,” reflecting the Department’s priorities to standardize the evaluation of vendor proposals and facilitated the scoring process
- Developed a draft contract and Statement of Work (SOW) that complied with Indiana, DOR, and IDOA statutes, policies, and procedures. Collaborated with Indiana State legal and procurement experts to produce the final contract

RESULTS

As a result of netlogx’ procurement expertise and knowledge of IDOA and other Indiana State policies and procedures, we were able to assist the DOR with selecting a sole imaging vendor that met the department’s needs.

ADVANTAGES

- A Visioning Session aligned the netlogx team to the agency’s overarching strategy, setting the foundation for the procurement
- netlogx’ extensive procurement experience enabled the development of more accurate project schedules
- netlogx’ experienced staff and their knowledge of IDOA’s policies and procedures streamlined the RFP creation process
- Seeking feedback from staff members created a foundation to support change throughout the agency
- netlogx utilized internal tools to research other states and agencies that had previously conducted similar procurements
- netlogx’ understanding of and recent experience with the IDOA Q&A template expedited the procurement process
- netlogx’ collaborative Q&A process reduced the burden on staff SMEs
- netlogx created evaluation guides to point the evaluators to the sections of the Proposals that directly addressed the requirements in the RFP
- netlogx developed a scoring tool that provided immediate feedback to DOR on how different weightings altered the selection of a vendor
- Early and frequent collaboration with the NextDOR project team and stakeholders helped to ensure the selected vendor would meet the DOR’s existing and future needs