

**STATEMENT OF WORK  
LEAN MANAGEMENT SERVICES  
INVITATION TO QUALIFY (ITQ) CONTRACT**

**OVERVIEW:** The purpose of the Lean Management Services ITQ is to qualify responsible and responsive Contractors with substantial state government experience to perform consulting services to Commonwealth of Pennsylvania's executive agencies.

Staff augmentation is not permitted under this contract.

**ISSUING OFFICE:** This ITQ is managed and administered by the Governor's Office of Performance Through Excellence. All inquiries should be referred to:

Stephanie Dunn, Administrative Officer 2  
Department of General Services | Bureau of Procurement  
1800 Herr Street, 2nd Floor  
Harrisburg, PA 17103  
Telephone: (717) 346-3840  
Email:[stepdunn@pa.gov](mailto:stepdunn@pa.gov)

**TERM OF CONTRACT:** Any contract issued to qualified Contractors, as a result of this ITQ, shall commence on the Contract Effective Date and shall end on January 31, 2025. There are no renewals available.

**QUALIFICATIONS:** Contractors interested in becoming an ITQ Contractor must meet the following requirements. Failure to meet the below requirements will result in the application being rejected. Each Contractor that meets the minimum qualifications will be awarded a contract. Award of a contract to a Contractor is not a guarantee of business.

- A. Contractors must provide documentation showing two (2) years of experience in the appropriate commodity code selected under Service Categories; and
- B. Contractors must provide resumes of the employees performing the work in the appropriate commodity code selected under the Services Categories.

**SERVICES CATEGORIES:** Contractors will need to choose the appropriate commodity code(s) to qualify for this contract. Contractors will select the appropriate code(s) under the Business Details section of the qualification process. The Commonwealth may add additional commodity codes as the need arises. The table below lists the appropriate commodity code and description of each category.

<b>COMMODITY CODE</b>	<b>DESCRIPTION OF CATEGORY</b>
80100000-ITQ-273 <b>General Process Improvement</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in utilizing lean continuous process improvement methods and tools.
80100000-ITQ-274 <b>Strategic Planning</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in: setting the strategic direction of organizations; defining vision, mission, values, and goals; aligning strategies and operational processes to an organization’s goals; and engaging employees in defining an organization’s purpose and direction.
80100000-ITQ-275 <b>Performance Management System</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in creating process and outcome measures, visual management tools (e.g. huddle boards, scorecards, dashboards), and reporting structures (e.g. tiered huddles, business reviews, Stat meetings) at every level of an organization to enable clear visibility into organizational performance and inform decision-making.
80100000-ITQ-276 <b>Organizational Change Management</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in the development of systems and processes to successfully manage organizational change and ensure desired levels of adoption, utilization, and proficiency.
80100000-ITQ-277 <b>Problem Solving</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in data-driven problem solving methods, including activities such as developing problem statements, process mapping, root cause analysis, developing solutions, and measuring results.
80100000-ITQ-278 <b>Breakthrough Initiatives</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in planning and executing significant improvements or large-scale projects intended to advance an organization’s long-term strategic objectives.
80100000-ITQ-279 <b>Improving the Customer Experience</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in designing and delivering high-quality government services that exceed customer expectations, through application of methods such as voice of the customer focus groups, journey mapping, and design thinking.
80100000-ITQ-280 <b>Employee Engagement</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in creating a workplace culture that enables all employees to give their best each day, be enthusiastic about their work, understand their role in achieving organizational goals and contribute to organizational success by improving their work processes.
80100000-ITQ-281 <b>Project Management</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in developing the competency within organizations to lead, manage, and direct projects of varying levels of complexity in order to achieve organizational goals.
80100000-ITQ-282 <b>Leadership Development</b>	Services may include, but are not limited to, training; consulting; mentoring; coaching; and facilitation in developing the capability of leaders to model the behaviors necessary to create a continuously improving, results-oriented organization and provide effective coaching to their teams.

## **GENERAL INFORMATION/REQUIREMENTS:**

- A. Type of Contract.** Upon determination that the Contractor meets the ITQ requirements, the Commonwealth will issue a contract to the Contractor. Upon receipt of a Purchase Order (PO) issued under this Contract, the Contractor agrees to furnish the requested services to the Commonwealth agency issuing the PO.
- B. Order of Precedence.** If any conflicts or discrepancies should arise in the terms and conditions of this Contract, or the interpretation thereof, the order of precedence shall be:
- i. This Contract;
  - ii. The data resident on the ITQ web site and incorporated herein by reference at the date of execution of the Contract or issuance of an RFQ off of this Contract, whichever is later, including but not limited to the promises and certifications the Contractor made in qualifying for the Contract;

If any conflicts or discrepancies should arise in the interpretation of a PO, the order of precedence shall be:

- i. The consulting service category definitions, descriptions, qualification requirements, and contract terms and conditions set forth in the RFQ;
- ii. This Contract;
- iii. The PO and any attachment thereto, including: (1) the Contractor's Proposal, as accepted by the Commonwealth; (2) the RFQ.

**C. Bid Protest Procedure (April 2016)** The Bid Protest Procedure is on the DGS website. [Click here](#)

**D. Post-Submission Descriptive Literature.** The Commonwealth may, during its evaluation of the RFQ, require any Contractor to submit cuts, illustrations, drawings, prints, test data sheets, specification sheets and brochures which detail construction features, design, components, materials used, applicable dimensions and any other pertinent information which the Issuing Office may require in order to evaluate the product(s) offered. The required information must be submitted within two (2) business days after notification from the Issuing Office. Failure to submit the required information prior to the expiration of the second business day after notification shall result in the rejection of the bid as non-responsive.

**E. Tie Bids/Quotes.** All tie bids/quotes will be broken by the Issuing Office.

**F. Prompt Payment Discounts.** Prompt payment discounts will not be considered in making an award. If prompt payment discounts are offered by any Contractor, however, the Issuing Office will take advantage of such offer.

**REQUEST FOR QUOTES (RFQ) PROCEDURES:** Commonwealth Agencies will issue an RFQ to qualified Contractors, through the Commonwealth's Custom Portal, powered by the JAGGAER system. Contractors will respond to the RFQ in the system. The requesting Agencies may require the qualified Contractors to furnish, upon request, additional documentation in the RFQ. The qualified Contractors selected for the RFQ process will receive a Purchase Order (PO) and will supply the service to meet the specific requirements as indicated in the RFQ.

Agencies will exercise a scoring method based upon the criteria set forth in the RFQ. The Scoring Methods are defined as follows:

- Best Value
  - Refers to the process of selecting the quote which provides the greatest value to the agency based on evaluating and comparing all pertinent criteria, including cost, so that the Contractor whose overall proposal best suits the agency's needs is selected for each individual project; and
- Low Cost
  - Refers to the lowest cost quoted from all proposals received that are deemed both responsive and responsible for the project.