



# knowledge services

Serving Those Who Serve Others

State of Arizona MTS-MSP Vendor Training Meeting  
Project Based Consulting

*March 2025*

# Introduction & MSP Team Overview



**Jenna Lentz**  
Senior Practice Director



**Matt Fahey**  
Regional Director



**Stephanie McClure**  
Senior Manager, Implementations



**Yasanta Wells**  
Vendor Network Manager



**Bill Evans**  
Senior Vice President



**Andrea Connell**  
Director, Statement of Work,  
Center of Excellence



**John Towle**  
Training & Change  
Management Specialist



**Ashley Lacy**  
Director, MSP Operations

# Introduction & MSP Team Overview



**Halley Naramore**  
Program Manager



**Darren Boykin**  
Program Manager Cooperatives



**Gabby Rogals**  
Account Manager



**Lilly Armendariz**  
Account Manager



**Bertha Mendez**  
Account Manager



**Maty Kalos**  
Account Manager



**Andrew Coates**  
Account Manager



**Navi Gill**  
Account Manager



**Elizabeth Barrett-Delaney**  
Account Manager

# Agenda

## Serving Those Who Serve Others

- Introductions
- Knowledge Services Overview
- Industry Definitions
- MSP Project Based Consulting Process
- MSP Process Requirements
- Implementation Timeline
- dotStaff™ Demo
- Questions & Answers



## Industry Definitions



- As the **Managed Service Provider (MSP)**, Knowledge Services takes on primary responsibilities for managing an organization's contingent/temporary/contractor workforce program, project/milestone deliverable work and staffing vendors.
- dotStaff™ is Knowledge Services' **Vendor Management System (VMS)** which is an internet-enabled workforce and project sourcing, timekeeping, milestone and invoicing application that enables Users to procure and manage a wide range of contingent/temporary/contract and project resources and services in accordance with the organization's processes and rules.





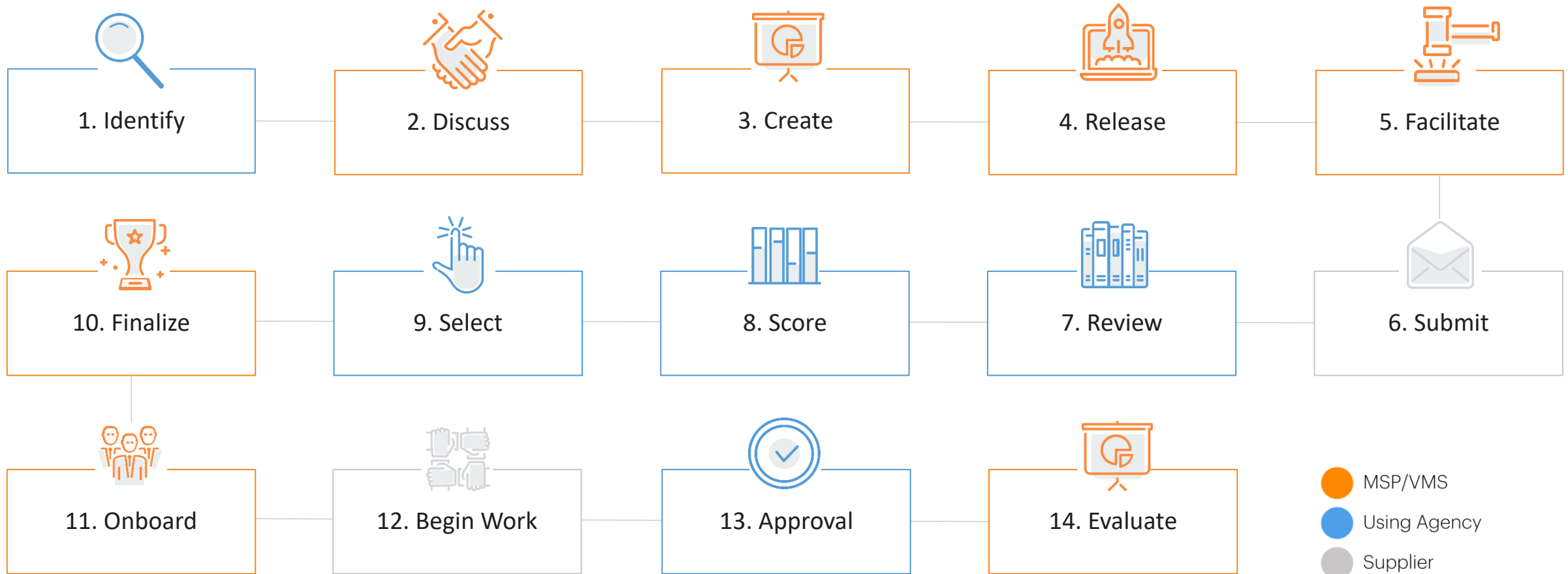
# Contractual Requirements



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- Participating vendors must sign MSA with Knowledge Services
  - Current vendors have been invited to participate
- 0.74% Vendor-Funded Administrative MSP Fee
  - Additional 2% State Administrative Fee for Cooperatives only (paid back to the State)
- Authorized projects under one million dollars (\$1,000,000)
- Payment terms of Net 30 upon receipt of an accurate and complete invoice
- Vendor-funded pre-screening for project resources, as required by the State
- Vendors must adhere to the MSP Process for all open project requisitions

# MSP Project Based Consulting Services



# MSP Project Based Consulting Request Process



## Posting Requisition Process

1. Hiring Manager submits a dotStaff™ Request for Project Services form
2. MSP Program Team confirms receipt of request within 4 business hours
3. MSP Program Team creates a draft Posting in dotStaff™ and qualifies the Statement of Work through an intake call with the Hiring Manager
  - Intake call discussion items confirmed, include:
    - Deliverable and Services details, including on-going maintenance and support
    - Timeline
    - Budget
    - Additional information, if applicable



# MSP Project Based Consulting Request Process



## Posting Requisition Process cont.

4. MSP Program Team updates the Posting and releases the Posting to all Vendors servicing the project labor category at the same time in dotStaff™
5. MSP Program Team facilitates pre-proposal conference call, if requested
6. MSP Program Team facilitates Q&A
7. Vendors submit qualified proposals in dotStaff™
  - Project Title and name of Resources performing under the Project
  - Proposed Milestones
  - Description of Services to be Delivered
  - Proposed Project and Pricing Schedule



# MSP Project Based Consulting Request Process



## Proposal Vetting, Review & Selection

8. MSP Program Team reviews and evaluates proposals for required documentation only
9. MSP Program Team sends proposals for review to the Hiring Manager
10. Hiring Manager reviews proposals and selects Vendors for presentations, if applicable
11. MSP Program Team conducts Best and Final Offer (BAFO) with Vendors of interest
12. Hiring Manager provides scoring and feedback for all proposals and confirms selected Vendor
13. Hiring Manager or MSP Program Team accepts the Bid of the selected vendor in dotStaff™, which notifies the awarded Vendor of award
14. MSP Program Team initiates onboarding process with Agency and Vendor's project resources, if applicable



# MSP Project Based Consulting Request Process



## Work Order & Billing Process

15. MSP Program Team creates Work Order and routes for signatures from Agency and Vendor
16. MSP Program Team sends fully executed Work Order to Hiring Manager to issue the PO
17. MSP Program Team obtains PO from APP or Hiring Manager
18. MSP Program Team sends fully executed Work Order to Vendor, clearing the Vendor to begin project
19. Vendor begins project work and submits deliverables as completed
20. Agency Manager approves submitted deliverables in dotStaff™
21. dotStaff™ generated invoices sent to the Agency
22. State pays Knowledge Services
23. Knowledge Services pays the Vendor



# Required Documents



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- Request for Project Services Template
  - Details of project background, deliverables, and pertinent project details
- Project Timeline
  - Identified deadlines for pre-proposal conference call, Q&A, and proposal due date
- Q&A Template
  - Template for vendors to submit written questions and for Agency responses
- Project Services Evaluation
  - Template for award criteria
- Work Order (WO)
  - Work Order is created based on approved proposal
- Purchase Order (PO)
  - Agency issues PO based on fully-executed Work Order provided by the Knowledge Services MSP Team
- Change Order (CO)
  - Any SOW modifications will need to be communicated to the MSP and must be agreed upon by all parties
- Project Close Out Document
  - Template for agency to confirm completion to vendor after project completion

# Project Timeline

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### Timeline / Important Dates

Activity	Date
Issue of SOW/Project Request for Services	MM/DD/YYYY
Pre-bidders Conference (optional)	MM/DD/YYYY
Deadline for Vendors to Submit Written Questions, via Q&A Template, to <a href="mailto:SOW@knowledgeservices.com">SOW@knowledgeservices.com</a> by 3:00pm MST	MM/DD/YYYY
Agency Answers to Written Questions	MM/DD/YYYY
Proposals Due in dotStaff™ by 3:00pm MST	MM/DD/YYYY
Services Awarded	MM/DD/YYYY
Services Start	Upon fully executed work order and issuance of purchase order

*The above timeline is only an illustration of the Project RFS process. The dates associated with each step are not to be considered binding. Due to the unpredictable nature of the Project RFS process in general, these dates are commonly subject to change. At the conclusion of the evaluation process, all Respondents will be informed of the evaluation team's findings.*

*During the procurement process, vendors are to have no contact with the Agency. Such action may disqualify Respondent from further consideration for an award or contract resulting from this process.*

# Request for Project Services Template

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### Project Background

#### 1. Project Background & Overview

Explain why the Agency is contracting for this deliverables-based service. Provide useful information regarding the Agency organization, project history, future plans, or any other relevant information regarding the work to be performed.

#### 2. Project Purpose and Objective

Describe the outcome on a broader level proving a specific, measurable action or deliverable that needs to be achieved to reach the project's overall purpose.

#### 3. In Scope Work & Deliverables

The goal of this SOW is (agency should create a high-level list of what the SOW will accomplish). The scope may include, but not limited to, the following activities:

- Scope of work (or services to be delivered)
- Project risks, assumptions and constraints
- Roles and responsibilities
- Description of Services (high-level)
- Technical requirements
- Detailed list of deliverables
- Project schedules to be achieved by vendor
- Project completion criteria
- Service-level objectives Key performance indicators
- Service-level agreements (SLAs), if applicable
- Service-level management
- Relevant quality processes that will apply, such as change management, acceptance, and risk and issue management

#### 4. Out of Scope

Requirements that do not fall within the boundaries of the required functionalities and specifications documented in the request for services

#### 5. Vendor Required Experience Preferred or Required

- Competitive advantage
- Relevant experience
- Resumes of staff
- Required Certifications, Accreditation



# Request for Project Services Template

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**Pricing Model** (Select expected pricing model – delete others)

## Milestone/Deliverable Pricing Model

Milestone/Deliverable	Cost
Milestone/Deliverable 1:	\$ XX.XX
Milestone/Deliverable 2:	\$ XX.XX
Milestone/Deliverable 3:	\$ XX.XX
Milestone/Deliverable 4:	\$ XX.XX
Milestone/Deliverable 5:	\$ XX.XX
<b>Total Project Costs*</b>	<b>\$ XX.XX</b>

*\*Note: Total Project Costs are not to exceed amount submitted/proposed. Price must be **ALL INCLUSIVE**, including, but not limited to, any and all travel and delivery costs.*

## Fixed-bid Pricing Model

Project Costs	Cost
<b>Total Project Costs*</b>	<b>\$ XX.XX</b>

*\*Note: Total Project Costs are not to exceed amount submitted/proposed. Price must be **ALL INCLUSIVE**, including, but not limited to, any and all travel and delivery costs.*

# Question and Answer Template

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Q&A Template for MSP Project							knowledge services
Client Name:							
Project Name:							
Question Number	Vendor Name	Section	Page Number	Topic	Specific Question/Inquiry	State Response	
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							

# Project Services Evaluation

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### Evaluation Process and Criteria

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the Request for Project Services in a cost-effective manner.

Mandatory Vendor response requirements must be included and referenced in scoring criteria.

#### Summary of Evaluation Criteria

Criteria	Points	Reference Section Number
Cost (recommended: 35% of total points)	XX	
Adherence to Mandatory Requirements	Pass/Fail	
Quality of Experience	XX	
Quality of Staff	XX	
Quality of Project Plan	XX	
Quality of References	XX	
<b>Total</b>	<b>[100 available points]</b>	

# Work Order

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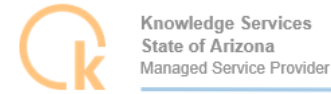
### Request for Project Services Work Order

Project Name	[Insert text]
State Agency	[Insert text]
Vendor Name	[Insert text]
Est. Project Start Date	MM/DD/YYYY
Est. Project End Date	MM/DD/YYYY

**Project Overview**  
[Insert text]

**Project Requirements**  
[Insert text]

Deliverable / Services Description	Cost
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
<b>Total Project Cost</b>	<b>\$ XX.XX</b>



In the event of any inconsistencies between this Request for Project Services Work Order and the terms of the Master Services Agreement, the following order of precedence shall be:

1. Master Services Agreement; and
2. Request for Project Services Work Order

Until the contract is approved and fully executed, any actions you take in reliance of contract approval are at your own risk. Therefore, it may be unwise to expend funds or incur expenses in anticipation that contract negotiations will be successful, and a tendered contract will be approved.

### AUTHORIZATION

All project milestones, deliverables, tasks, or other such project activities shall be entered and approved in the dotStaff™ VMS by the State. Vendor acknowledges and agrees that Knowledge Services' payment to Vendor is contingent upon approval by the State and receipt of payment from the State by Knowledge Services. The State is solely responsible for approval and payment of all project activities, and Knowledge Services is not responsible or liable to Vendor for non-approval or non-payment by the State.

### Vendor

\_\_\_\_\_  
Authorized Signature                      Printed Name                      Date

### Agency

\_\_\_\_\_  
Authorized Signature                      Printed Name                      Date

### MSP

\_\_\_\_\_  
Authorized Signature                      Printed Name                      Date



# Change Order

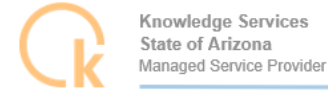
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### Request for Project Services Change Order 001

Project Name	[Insert text]
State Agency	[Insert text]
Vendor Name	[Insert text]
Est. Project Start Date	MM/DD/YYYY
Est. Project End Date	MM/DD/YYYY
Posting ID#	[Insert here]
Change Order Justification	[Enter Description]

Deliverable / Services Description	Cost
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
[Insert text]	\$ XX.XX
<b>Total Project Cost</b>	<b>\$ XX.XX</b>



In the event of any inconsistencies between this Request for Project Services Change Order and the terms of the Master Services Agreement, the following order of precedence shall be:

1. Master Services Agreement; and
2. Request for Project Services Change Order

Until the contract is approved and fully executed, any actions you take in reliance of contract approval are at your own risk. Therefore, it may be unwise to expend funds or incur expenses in anticipation that contract negotiations will be successful, and a tendered contract will be approved.

All project milestones, deliverables, tasks, or other such project activities shall be entered and approved in the dotStaff™ VMS by the State. Vendor acknowledges and agrees that Knowledge Services' payment to Vendor is contingent upon approval by the State and receipt of payment from the State by Knowledge Services. The State is solely responsible for approval and payment of all project activities, and Knowledge Services is not responsible or liable to Vendor for non-approval or non-payment by the State.

### AUTHORIZATION

#### Vendor

_____	_____	_____
Authorized Signature	Printed Name	Date

#### Agency

_____	_____	_____
Authorized Signature	Printed Name	Date

#### MSP

_____	_____	_____
Authorized Signature	Printed Name	Date



# Mid-Project Survey

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### Project Based Consulting Mid-Project Stakeholder Survey

Please complete the information below that accurately reflects your experience.

First Name *	Last Name *	Department/Division *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email *	Phone (Ext: Optional) *	
<input type="text"/>	<input type="text" value="( ) - -"/>	
Project Name *	Vendor Company Name *	
<input type="text"/>		

Overall how do you feel your project is progressing? \*

On Track  
 Minor Variance  
 Significant Variance

#### Vendor Communication

Level of Responsiveness *	Professional & Knowledgeable *	Proactive & Consistent *
<input type="radio"/> 1 - Poor <input type="radio"/> 2 - Unsatisfactory <input type="radio"/> 3 - Satisfactory <input type="radio"/> 4 - Very Satisfactory <input type="radio"/> 5 - Outstanding	<input type="radio"/> 1 - Poor <input type="radio"/> 2 - Unsatisfactory <input type="radio"/> 3 - Satisfactory <input type="radio"/> 4 - Very Satisfactory <input type="radio"/> 5 - Outstanding	<input type="radio"/> 1 - Poor <input type="radio"/> 2 - Unsatisfactory <input type="radio"/> 3 - Satisfactory <input type="radio"/> 4 - Very Satisfactory <input type="radio"/> 5 - Outstanding

Please explain the reason for the Vendor Communication rating (optional)



# Project Closure Survey

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<b>Project Name:</b>	<b>Vendor:</b>	<b>Prepared By:</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Customer/End User Group:</b>	<b>Sponsoring Agency:</b>	<b>Date:</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 1 Project Lessons Learned

The objective of this report is gathering all relevant information for better planning of later project stages and future projects, improving implementation of new projects, and preventing or minimizing risks for future projects.

### 1.1 Project Successes and Contributors

Success Description	Factors that Supported the Success
<input type="text"/>	<ul style="list-style-type: none"> <li><input type="text"/></li> </ul>
<input type="text"/>	<ul style="list-style-type: none"> <li><input type="text"/></li> </ul>

### 1.2 Project Shortcomings, Cause, and Actions

Shortcoming Description	Project Area	Suggested Remediation Action
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

PERFORMANCE APPRAISAL 1=UNSATISFACTORY, 2=FAIR, 3=SATISFACTORY, 4=OUTSTANDING

Factor	1	2	3	4	Comments
Ability to achieve project objectives	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Effectiveness in overall project direction and leadership during all phases	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ability to effectively communicate with customer, sponsor, project team, and other stakeholders	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Overall Attitude	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ability to effectively use organizational resources	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ability to build and maintain an effective project team	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Effective project planning	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Effective project execution and control	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ability to sustain high level of customer satisfaction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Additional comments



## ■ Service Level Agreements

<b>Performance Metric</b>	<b>Goal</b>	<b>Description</b>
Project Deliverables, Services, and Requirements	100%	Measures if Contractor achieves all project deliverables, services, and requirements in SOW.
Project Timeline for Deliverables, and Services in Implementation Schedule	98%	Measures if Contractor Meets timeline dates for deliverables and services in implementation schedule in SOW.
Evaluation, Testing, and Acceptance	98%	Measures if deliverables and/or services pass evaluation, testing, and acceptance requirements detailed in SOW.

# State of Arizona Vendor Program Page



<https://programs.knowledgeservices.com/azmsp/vendor-mts-msp-program-info/>

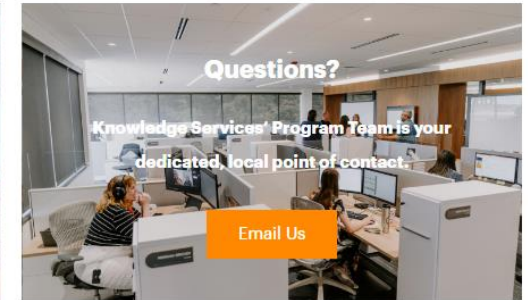
## Program Page Includes:

- Program Kickoff Presentation
- Program Training Presentation
- Important Reminders
- Program Information
- dotStaff™ Training materials



**Multi-Temporary Staffing Services - Managed Services Provider (MTS-MSP) Program Information for State of Arizona Vendors**

Contract CTR073668



# ■ Remaining Implementation Timeline

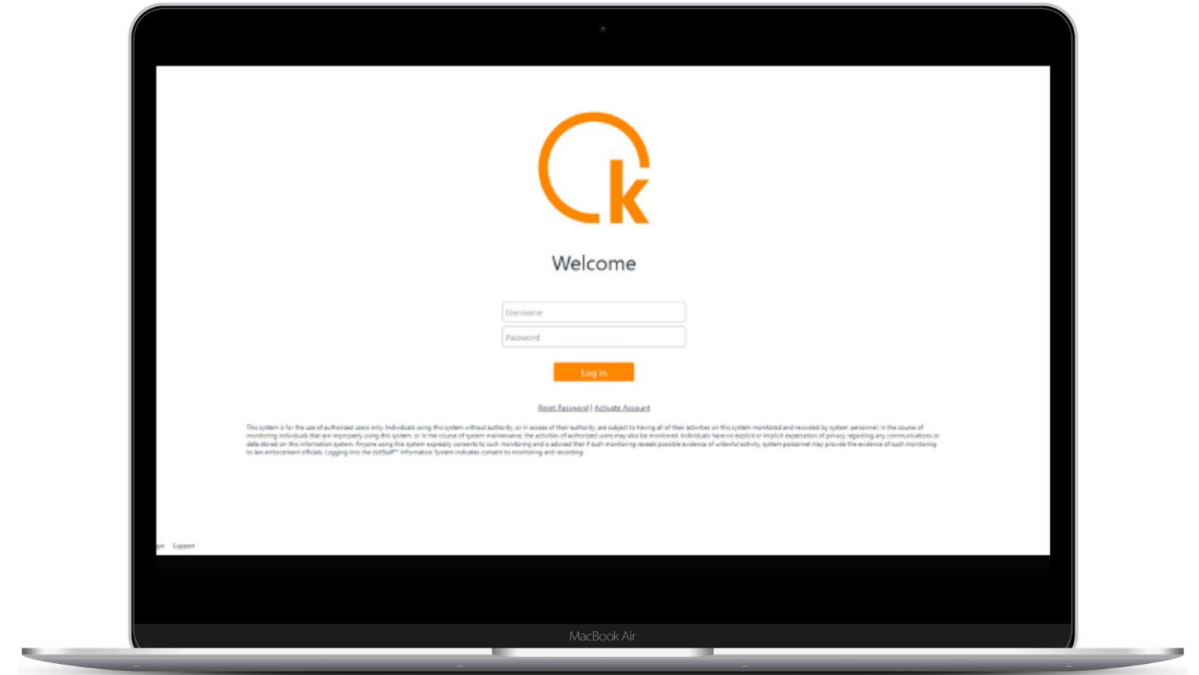
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Project Based Consulting Implementation	
New Requisition Black Out Period	March 10 <sup>th</sup> – March 28 <sup>th</sup>
Manager Program and VMS Training	Weeks of March 10 <sup>th</sup> and March 17 <sup>th</sup>
Vendor Program and VMS Training	Weeks of March 10 <sup>th</sup> and March 17 <sup>th</sup>
Final Data Transition and Revisions	Week of March 17 <sup>th</sup>
Program Welcome Email	Week of March 24 <sup>th</sup>
Go Live for new Staff Augmentation Requisitions and Project Based Consulting Projects	Saturday, March 29 <sup>th</sup> , 2025

# ■ dotStaff™ Demonstration

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- dotStaff™ Postings
  - Submitting Proposals
- Accepting/Rejecting Project Proposals
- Submitting Deliverables
- Reporting





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Affordable. Experienced. Local. Flexible. Proven.

**Committed to Arizona.**

We are here to answer any questions you may have.

[AZMSP@KnowledgeServices.com](mailto:AZMSP@KnowledgeServices.com)

# Questions and Answers

