



**INFORMAL REQUEST FOR PROPOSAL
No. JD186163IP**

**Atlassian JIRA Workflow Design,
Configuration, and Ongoing Support**

PROPOSAL DUE DATE AND TIME

January 4th, 2017 (3:00 PM, PT)

SUBMITTAL LOCATION

Oregon State University
Procurement, Contracts and Materials Management
644 SW 13th Avenue
Corvallis, Oregon 97333

OSU Procurement, Contracts and Materials Management Offices are open Monday through Friday 8:00 am-12:00 noon and 1:00 pm-5:00 pm.
Offices are closed during the 12:00 noon-1:00 pm lunch hour.

ELECTRONIC SUBMITTAL ADDRESS

joshua.dodson@oregonstate.edu

1.0 GENERAL

1.01 SCHEDULE OF EVENTS

- Issue Date.....December 22nd, 2016
- Deadline for Requests for Clarification or Change.....December 29th, 2016 (3:00 pm, PT)
- Proposal Due Date and Time.....January 4th, 2017 (3:00 pm, PT)

This Schedule of Events is subject to change. Any changes will be made through the issuance of Written Addenda.

1.02 ISSUING OFFICE

The Procurement, Contracts and Materials Management (PCMM) department of Oregon State University ("OSU") is the issuing office and is the sole point of contact for this Request for Proposal. Address all concerns or questions regarding this solicitation to the Administrative Contact identified below.

1.03 ADMINISTRATIVE CONTACT

Name: Joshua Dodson
Title: Procurement Contract Officer
Telephone: 541-737-3572
Fax: 541-737-2170
E-Mail: joshua.dodson@oregonstate.edu

1.04 DEFINITIONS

As used in this solicitation, the terms set forth below are defined as follows:

- a. "Addenda" means an addition to, deletion from, a material change in, or general interest explanation of the Request for Proposal.
- b. "Exhibits" means those documents which are attached to and incorporated as part of the Request for Proposal.
- c. "Proposal" means an offer, binding on the Proposer and submitted in response to the Request for Proposal.
- d. "Proposer" means an entity that submits a Proposal in response to the Request for Proposal.
- e. "Proposal Due Date and Time" means the date and time specified in the Request for Proposal as the deadline for submitting Proposals.
- f. "Request for Proposal" (RFP) means the document issued to obtain Written, competitive Proposals to be used as a basis for making an acquisition or entering into a Contract when price will not necessarily be the predominant award criteria.
- g. "Responsible" means an entity that demonstrates their ability to perform satisfactorily under a Contract by meeting the applicable standards of responsibility outlined in OSU Standard 580-061-0130.
- h. "Responsive" means a Proposal that has substantially complied in all material respects with the criteria outlined in the Request for Proposal.
- i. "Written or Writing" means letters, characters, and symbols that are intended to represent or convey particular ideas or meanings and are made in electronic form or inscribed on paper by hand, print, type, or other method of impression.

2.0 INTRODUCTION AND BACKGROUND

2.01 INTRODUCTION

Procurement, Contracts and Materials Management is seeking Responsive Responsible Proposers to submit Proposals for Atlassian JIRA Workflow Design, Configuration and Ongoing Support.

2.02 BACKGROUND

The Regional Class Research Vessel (RCRV) program at Oregon State University shall manage the design, construction, and operation of up to three oceanographic research vessels for the US academic fleet. As a multi-year National Science Foundation (NSF) Large Facility program the RCRV program operates under processes and protocols for tracking, managing, and executing project changes codified in the NSF's Large Facilities Manual (LFM) in all phases of design, contracting, and construction. The RCRV program currently

uses Atlassian Confluence extensively for project management and collaboration tasks and plans to incorporate JIRA software into this existing system.

2.03 OREGON STATE UNIVERSITY

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only institution to have earned both Carnegie Foundation classifications for Highest Research Activity and Community Engagement, recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in all of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. OSU offers undergraduate, masters and doctoral degrees through 11 academic colleges, the Honors College, Graduate School and online Ecampus, enrolling more than 31,000 students from every county in Oregon, every state in the country and more than 110 nations.

3.0 STATEMENT OF WORK / RECOMMENDATION AND FINDINGS REPORT

3.01 SAMPLE CONTRACT

A sample contract containing a statement of work and contractual terms and conditions is included at Exhibit A.

3.02 FINDINGS AND RECOMMENDATIONS REPORT

OSU contracted to have a Findings and Recommendations Report completed identifying the recommended scope of work for the Workflow Design and JIRA implementation project. See Exhibit E for more details.

4.0 PROPOSER QUALIFICATIONS

4.01 MINIMUM QUALIFICATIONS

In order to qualify as a Responsive Proposer, the Proposer needs to meet the minimum qualifications below.

- A. Demonstrated expertise and experience with Atlassian JIRA software suite:
 - a. Custom workflow design and development
 - b. Deployment and implementation onto on-premise client hardware
- B. Experience with the Atlassian JIRA security configuration and management
- C. Must have the ability (personnel and technical experience) to provide on-call support

4.02 PREFERRED QUALIFICATIONS

OSU will award additional points for Proposers able to meet the preferred qualifications below.

- A. Experience with customer training (technology transfer)

5.0 REQUIRED SUBMITTALS AND EVALUATION

5.01 REQUIRED SUBMITTALS

Proposers must submit the following information:

- Detailed information about how the Proposer plans to perform the Scope of work as described in Exhibit A based on the recommendations listed in Exhibit E.
- Resume, Curriculum Vitae, and/or selected project portfolio.
- Detailed information about how the Proposer meets the qualifications described in section 4.
- Exhibit B: Certifications
- Exhibit C: References
- Exhibit D: Pricing

5.02 EVALUATION

This is a multistage evaluation. OSU will first review all Proposals to determine Responsiveness. Proposals that do not comply with the instructions, that are materially incomplete, that do not meet the minimum requirements, or that are submitted by Proposers who does not meet minimum qualifications may be deemed non-Responsive. Written notice will be sent to Proposers whose Proposal is deemed non-Responsive

identifying the reason. The evaluation committee will then perform first stage evaluations on the Written Proposals based on the following evaluation criteria. Points will be given in each criteria and a total score will be determined. The maximum points available for each criterion are identified below.

<u>Evaluation Criteria</u>	<u>Points</u>
Proposal relative to the Statement of Work (Exhibit A)	50
Proposer's qualifications relative to the qualifications	20
Price for Phase 1 (Exhibit D)	30
Total	100

OSU may award after the first stage evaluation to the highest ranked Proposer without moving on to the second stage evaluation. If OSU decides to move to a second stage evaluation, the highest ranked Proposers from the first stage evaluation will move to the second stage evaluation. Proposers who are included in the second stage evaluation may be requested to provide additional information about their Proposal through interviews, presentations, requests for best and final Proposals or other methods relevant to the goods or services, in order for the evaluation committee to make a final determination. Points awarded in the first stage evaluation will not be carried to the second stage evaluation. If a second stage evaluation of all Proposers does not produce an award that is in OSU's best interest, OSU may return to the first stage evaluation to advance additional Proposers to a second stage evaluation.

5.03 AWARD

Contract will be awarded to the Proposer who, in OSU's opinion, meets the requirements and qualifications of the RFP and whose Proposal is in the best interest of OSU. If a successful Contract cannot be completed after award, OSU may conclude contract negotiations, rescind its award to that Proposer, and return to the most recent RFP evaluation stage to negotiate with another Proposer(s) for award.

5.04 INVESTIGATION OF REFERENCES

OSU reserves the right to investigate and to consider the references and the past performance of any Proposer with respect to such things as its performance or provision of similar goods or services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, subcontractors, and workers. OSU further reserves the right to consider past performance, historical information and facts, whether gained from the Proposal, Proposer interviews, references, OSU or any other source in the evaluation process. OSU may postpone the award or execution of the Contract after the announcement of the notice of intent to award in order to complete its investigation.

6.0 INSTRUCTIONS TO PROPOSERS

6.01 APPLICABLE STATUTES AND RULES

This RFP is subject to the applicable provisions and requirements of the Oregon Revised Statutes, Oregon Administrative Rules, and OSU Policies and Procedures.

6.02 COMMUNICATIONS DURING RFP PROCESS

In order to ensure a fair and competitive environment, direct communication between OSU employees other than the Administrative Contact or other PCMM representative and any party in a position to create an unfair advantage to Proposer or disadvantage to other Proposers with respect to the RFP process or the award of a Contract is strictly prohibited. This restricted period of communication begins on the issue date of the solicitation and for Proposer(s) not selected for award ends with the conclusion of the protest period identified in OSU Standard 580-061-0145(3) and for Proposers(s) selected for award ends with the contract execution. This restriction does not apply to communications to other OSU employees during a Pre-Proposal conference or other situation where the Administrative Contact has expressly authorized direct communications with other staff. A Proposer who intentionally violates this requirement of the RFP process or otherwise deliberately or unintentionally benefits from such a violation by another party may have its Proposal rejected due to failing to comply with all prescribed solicitation procedures. The rules governing rejection of individual solicitation responses and potential appeals of such rejections are at OSU Standard 580-061-0130.

6.03 REQUESTS FOR CLARIFICATION OR CHANGE

Requests for clarification or change of the Request for Proposal must be in Writing and submitted to PCMM at least two (2) days before the Proposal Due Date and Time, unless specified otherwise herein. Such requests for clarification or change must include the reason for the Proposer's request. OSU will consider all timely requests and, if acceptable to OSU, amend the Request for Proposal by issuing an Addendum. Envelopes, e-mails or faxes containing requests should be clearly marked as a Request for Clarification or Change and include the RFP Number and Title.

6.04 ADDENDA

Only documents issued as Written Addenda by PCMM serve to change the Request for Proposal in any way. No other direction received by the Proposer, written or verbal, serves to change the Request for Proposal. Addenda will be publicized on the OSU procurement website. Proposers are advised to consult the OSU procurement website prior to submitting a Proposal in order to ensure that all relevant Addenda have been incorporated into the Proposal. Proposers are not required to submit Addenda with their Proposal. However, Proposers are responsible for obtaining and incorporating any changes made by Addenda into their Proposal. Failure to do so may make the Proposal non-Responsive, which in turn may cause the Proposal to be rejected.

6.05 PREPARATION AND SIGNATURE

Proposals should be Written and signed in ink by an authorized representative with authority to bind the Proposer. Signature certifies that the Proposer has read, fully understands, and agrees to be bound by the RFP and all Exhibits and Addenda to the RFP.

6.06 PUBLIC RECORD

Upon completion of the Request for Proposal process, information in all Proposals will become subject records under the Oregon Public Records Law. Only those items considered a "trade secret" under ORS 192.50 (2), may be exempt from disclosure. If a Proposal contains what the Proposer considers a "trade secret" the Proposer must mark each sheet of information as such. Only bona fide trade secrets may be exempt and only if public interest does not require disclosure.

6.07 SUBMISSION

Proposals must be received in the PCMM office no later than the Proposal Due Date and Time. Envelopes, faxes, or e-mails containing Proposals should contain the RFP No., RFP Title and the Proposal Due Date and Time. Proposals may be mailed to Oregon State University, Procurement, Contracts, and Materials Management, 644 SW 13th Street, Corvallis, OR 97333-4238, faxed to (541) 737-2170 or e-mailed in PDF format to the Administrative Contact noted above. It is highly recommended that a Proposer confirms receipt of the Proposal with the Administrative Contact noted above.

6.08 PROPOSALS ARE OFFERS

The Proposal is the Proposer's offer to enter into a Contract pursuant to the terms and conditions specified in the RFP, its Exhibits, and Addenda. The offer is binding on the Proposer for one hundred twenty (120) days, unless otherwise specified herein. OSU's award of the Contract constitutes acceptance of the offer and binds the Proposer.

6.09 RIGHT TO REJECT

OSU may reject, in whole or in part, any Proposal not in compliance with the RFP, Exhibits, and Addenda. OSU may reject all Proposals if it is in the best interest of OSU to do so.

6.10 PROPOSAL PREPARATION COSTS

OSU is not liable for costs incurred by the Proposer during the RFP process.

6.11 AWARDS

OSU reserves the right to make award(s) by individual item, group of items, all or none, or any combination thereof; on a geographical basis and/or on a statewide basis with one (1) or more suppliers. OSU reserves the right to delete any item from the contract when deemed to be in the best interest of OSU.

**EXHIBIT A
SAMPLE CONTRACT**

This Contract is between Oregon State University for its Regional Class Research Vessel (RCRV) Program ("OSU"), and [Contractor's name] ("Contractor").

WHEREAS, OSU competitively solicited for the services outlined in this Contract under Request for Proposal number JD186163IP entitled Atlassian JIRA Workflow Design, and Configuration, and Ongoing Support and Contractor was selected as the Proposer best able to provide this service; and

WHEREAS, Contractor understands the requirements for the services outlined in this Contract, and is willing and able to provide, in accordance with the terms of this Contract, the services;

NOW, THEREFORE, OSU and Contractor agree as follows:

1. CONTRACT TERM AND TERMINATION:

A. CONTRACT TERM.

This Contract is effective on the date of last signature and expires twelve (12) months after the date of execution. OSU has the option to extend the term of this Contract for ten (10) additional twelve (12) month terms based on the current terms and conditions. OSU may exercise this option to extend by providing written notice to Contractor prior to the expiration of the Contract.

B. TERMINATION.

This Contract may be terminated at any time by mutual consent of both parties or by OSU upon thirty (30) days' written notice. In addition, OSU may terminate this Contract at any time by written notice to Contractor if (a) Federal or state statutes, regulations or guidelines are modified or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this Contract; (b) any license or certificate required by law or regulation to be held by the Contractor to provide the services required by this Contract is for any reason denied, revoked, or not renewed; or (c) OSU fails to receive funding, appropriations, allocations or other expenditure authority as contemplated by OSU's budget and OSU determines, in its assessment and ranking of the policy objectives explicit or implicit in OSU's budget, that it is necessary to terminate the Contract, or (d) if the OSU program for which this Contract was executed is abolished.

OSU may also terminate this Contract at any time by written notice for default (including breach of contract) if (a) Contractor fails to timely provide services or materials called for by this Contract; or (b) Contractor fails to perform any of the other provisions of this Contract, or so fails to pursue the work as to endanger performance of this Contract in accordance with its terms and conditions, and after receipt of written notice from OSU, fails to correct such failures within ten (10) days. Termination of this Contract under this Section or any other section is without prejudice to OSU's other rights and remedies.

C. REMEDIES FOR CONTRACTOR'S DEFAULT.

In the event Contractor is in default (which includes without limitation, incomplete services), OSU may, at its option, pursue any or all of the remedies available to it under this Contract and at law or in equity, including, but not limited to: (a) rejection of the services, (b) requiring Contractor to correct any defects without charge, (c) negotiation with Contractor to sell the services to OSU at a reduced price, (d) termination of the Contract, (e) withholding all moneys due for the services Contractor has failed to deliver within any scheduled completion dates or has performed inadequately or defectively, (f) initiation of an action or proceedings for damages, specific performance, or declaratory or injunctive relief, or (g) exercise of its right of set off. These remedies are cumulative to the extent the remedies are not inconsistent, and OSU may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

2. STATEMENT OF WORK:

- A. CONTRACT PHASES, REQUIRED SERVICES, DELIVERABLES AND DELIVERY SCHEDULE.
Contractor shall provide OSU with the following services during the Term of this Contract:

Phase 1 Required Services:

Primary Tasks: The RCRV Project team seeks assistance with the development of Atlassian JIRA workflow design and configuration for two key project processes:

- Change Management Workflow Project- tracking contract and budget changes through various project stages and institutional gates.
- Internal Organizational Workflow Project - issue tracking and assignment workflow for miscellaneous general project components external to the Change Management Process.

Secondary Tasks: The contractor shall deploy Atlassian Hipchat and Application links for integration with the OSU RCRV Projects existing JIRA and Confluence instances.

Phase 1 Delivery Schedule:

- Discovery Meeting (1 day onsite, January 2017): Contractor shall meet with the RCRV Project Office team onsite at OSU, to ensure that all needs, requirements, and specifications are well understood. Contractor shall work cooperatively with RCRV Project Office personnel to identify principle Issue Types and Screens, as well as Workflow requirements for Change Management and Internal Projects.
- Change Management Project Design & Configuration (off site, January 2017): Based upon findings from the discovery meeting the Contractor shall develop custom Atlassian JIRA Workflows, Screens, Post-Functions (including validation) and supporting reference documentation for the Change Management JIRA Project.
- Change Management Review Meeting (online teleconference, January 2017): To be held at 50% of Change Management Project completion Contractor shall present the draft workflows to the RCRV technical team (progress to date) for the Change Management Project. RCRV technical team shall evaluate design and development progress to ensure successful Contract outcome.
- Internal Project Design & Configuration (offsite, January 2017 - February 2017): Based upon findings from the discovery meeting the Contractor shall develop custom Atlassian JIRA Workflows, Screens, Post-Functions (including validation) and supporting reference documentation for the general Internal JIRA Project.
- Internal Project Review Meeting (online teleconference, February 2017): To be held at 50% Internal Organizational Project completion. Contractor shall present the draft workflows to the RCRV technical team (progress to date) for the Change Management Project. RCRV technical team shall evaluate design and development progress to ensure successful Contract outcome.
- HipChat & Application Links Deployment (March 2017)
- JIRA & Confluent Training (1 -2 days onsite, March 2017): Contractor shall perform onsite (online conferencing training will be considered) training for key RCRV Project Staff (no more than 10 users) in the use, maintenance, and modification of delivered product.

Phase 1 Deliverables:

Contractor shall develop custom Atlassian JIRA Workflows, Screens, Post-Functions (including validation) and supporting reference documentation for the Change Management JIRA Project.

HipChat & Application Links Deployment

JIRA and Confluence Training

Phase 2 Required Services:

Contractor shall provide hourly, use-based, post-delivery support as requested by OSU.

Phase 2 Delivery Schedule:

As needed beginning after completion of Phase 1 (estimated April 2017)

Phase 2 Deliverables:

Phone, remote access and onsite support of Atlassian JIRA and Confluence software upon OSU request.

B. KEY PERSONS.

Contractor and OSU agree that each individual specified below is an individual whose special qualifications and involvement in Contractor's performance of services form part of the basis of agreement between the parties for this Contract and is an individual through whom Contractor shall provide to OSU the expertise, experience, judgment, and personal attention required to perform services ("Key Person"). Each of the following is a Key Person under this Contract:

[List name and title and identify the specific services each Key Person is required to perform under this Contract.]

Neither Contractor nor any Key Person of Contractor shall delegate performance of services any Key Person is required to perform under this Contract to others without first obtaining OSU's written consent. Further, Contractor shall not, without first obtaining OSU's prior written consent, re-assign or transfer any Key Person to other duties or positions so that the Key Person is no longer available to provide OSU with that Key Person's expertise, experience, judgment, and personal attention. If Contractor requests OSU to approve a re-assignment or transfer of a Key Person, OSU shall have the right to interview, review the qualifications of, and approve or disapprove the proposed replacement(s) for the Key Person. Any individual OSU approves as a replacement for a Key Person is deemed a Key Person under this Contract.

C. ACCEPTANCE OF SERVICES.

Services furnished under this Contract are subject to acceptance by OSU. If OSU finds services furnished to be incomplete or not in compliance with the Contract, OSU, at its sole discretion, may either reject the services, require Contractor to correct any defects without charge, or negotiate with Contractor to reduce the price, whichever OSU deems appropriate under the circumstances. If Contractor is unable or refuses to cure any defects within a time deemed reasonable by OSU, OSU may pursue any of the remedies for Contractor's default detailed in that Section above.

D. BUSINESS REVIEWS.

Contractor will participate in Business Reviews as requested by OSU Procurement, Contracts, and Materials Management. Business Reviews will be scheduled by the Contract Administrator in OSU Procurement, Contracts, and Materials Management and will include attendance by OSU representatives, and Contractor's Regional Representatives. The reviews may include discussion of Contract terms and conditions, work performed under the Contract, financial data, proposal of

Contract improvements for increased service or lower costs, and any potential changes to the Contract.

3. COMPENSATION:

The total amount available for payment to Contractor and for authorized reimbursement to Contractor is \$[insert total amount of contract].

A. METHOD OF PAYMENT FOR SERVICES.

OSU shall pay Contractor the amounts specified for each of the following deliverables that OSU has accepted:

Phase 1

Completion of Draft JIRA Workflows, Screens, Post-Functions (including validation) and supporting reference documentation for the Change Management JIRA Project. \$_____

Finalized and OSU Accepted Custom Atlassian JIRA Workflows, Screens, Post-Functions (including validation) and supporting reference documentation for the Change Management JIRA Project.
\$_____

Completion of HipChat & Application Links Deployment \$_____

Completion of JIRA and Confluence Training \$_____

Phase 2

OSU shall pay Contractor \$[insert hourly rate] per hour up to but not in excess of \$[insert maximum amount] on a yearly basis for completed and OSU accepted services requested by OSU under Phase 2 of this Contract.

B. BASIS OF PAYMENT FOR SERVICES.

Phase 1

OSU shall pay Contractor all amounts due for services completed and accepted by OSU for the deliverables listed above in Paragraph A 'Method of Payment for Services.'

Phase 2

OSU shall pay Contractor monthly payments for services provided during the previous month, upon OSU's approval of the Contractor's invoice submitted to OSU for completed services, but only after OSU has determined that Contractor has completed, and OSU has accepted the completed services.

C. EXPENSE REIMBURSEMENT.

OSU will not reimburse Contractor for any expenses under this Contract.

D. INVOICES AND PAYMENT TO CONTRACTOR.

Contractor shall send invoices to OSU for services completed and accepted by OSU. Contractor shall include in each invoice:

- a. The Contract number;
- b. A description of services performed, including the dates services were performed, all deliverables delivered during the period of the invoices, the rate(s) for services performed, and the total cost of services;
- c. Itemization and explanation of all expenses for which Contractor claims reimbursement authorized under this Contract;
- d. The total amount due and the payment remittance address.

Contractor shall send all invoices to OSU's Department Administrator or to the Department to which the services were provided if a Department Administrator is not specified.

OSU shall pay Contractor for services performed at the prices and rates specified herein. Contractor shall look solely to OSU for payment of all amounts OSU owes to Contractor. Payment of OSU contracts is normally made within 30-45 days following the date the invoice is received. After 45 days, Contractor may assess overdue account charges up to a maximum of two-thirds of one percent (2/3 of 1%) per month or eight percent (8%) per annum on the outstanding balance pursuant to ORS 293.462.

4. INSURANCE:

A. GENERAL LIABILITY INSURANCE.

Contractor shall obtain, at Contractor's expense, and keep in effect during the term of this Contract, Commercial General Liability Insurance, including Products and Completed Operations coverage, with minimum limits of \$2,000,000 per occurrence and \$4,000,000 aggregate. Such insurance policy is to be issued by an insurance company authorized to do business in the State of Oregon with an A.M. Best rating of at least A-VII, or such other insurance carrier approved in writing, in advance, by OSU. OSU and its officers, board members, employees, and agents shall be included as additional insured in said insurance policy to the full limits of liability purchased by the Contractor even if those limits of liability are in excess of those required by this Contract.

B. PROFESSIONAL LIABILITY INSURANCE.

Contractor shall obtain, at Contractor's expense, and keep in effect during the term of this contract, Professional Liability Insurance. Coverage limits shall not be less than \$2,000,000 per occurrence.

C. AUTOMOBILE LIABILITY INSURANCE.

Contractor shall obtain, at Contractor's expense, and keep in effect during the term of this contract, Automobile Liability Insurance. This coverage can be provided by combining the Automobile Liability Insurance with the General Liability Insurance. Coverage limits shall not be less than \$2,000,000 combined single limit per occurrence.

D. PROPERTY INSURANCE.

The Contractor must maintain Property Insurance during the term of the Contract that covers all property used for Contract work and all Contractor-owned property that is stored at OSU.

E. PRIMARY COVERAGE.

Insurance carried by Contractor under this Contract shall be the primary coverage and non-contributory.

F. SUBCONTRACTORS

If Contractor enters into subcontracts for any services to be provided by Contract to OSU, Contractor shall require that all subcontractors maintain insurance meeting all the requirements stated in section 4.

G. WORKERS' COMPENSATION.

The Contractor, its subcontractors, if any, and all employers providing work, labor or materials under this Contract are subject employers under the Oregon Workers' Compensation law and shall comply with ORS 656.017, which requires them to provide workers' compensation coverage that satisfies Oregon law for all their subject workers, unless such employees are exempt under ORS 656.126.

H. CERTIFICATES OF INSURANCE.

As evidence of the insurance coverages required by this Contract, the Contractor shall furnish Certificate(s) of Insurance and any applicable endorsements to the OSU Contract Administrator, upon request. The Certificate(s) will specify all of the parties who are Additional Insureds.

Contractor shall be financially responsible for all deductibles, self-insured retentions and/or self-insurance included hereunder.

I. NOTICE OF CANCELLATION OR CHANGE.

Each insurance policy required by the insurance provisions of this Contract shall provide the required coverage and shall not be suspended, voided or canceled except after thirty (30) days prior written notice has been given to OSU, except when cancellation is for non-payment of premium, then ten (10) days prior notice may be given. Such notice shall be sent directly to OSU. If any insurance company refuses to provide the required notice, the Contractor or its insurance broker shall notify OSU of any cancellation, suspension, non-renewal of any insurance within seven (7) days of receipt of insurers' notification to that effect.

5. INDEMNIFICATION:

A. INDEMNITY.

a. Contractor shall indemnify, hold harmless and, not excluding OSU's right to participate, defend OSU and its officers, board members, employees, agents and other representatives from and against all liabilities, claims, actions, damages, losses, or expenses, including without limitation reasonable attorneys' fees and costs, that: (i) are caused or alleged to be caused, in whole or in part, by the negligence, omissions, wrongful acts or willful misconduct of the Contractor or any of its officers, directors, agents, employees, or subcontractors, or (ii) alleging Contractor's services, information or materials supplied by Contractor to OSU under this Contract, or OSU's use of any of the foregoing infringes on any patent, copyright, trade secret, trademark, or other proprietary right of a third party.

B. DEFENSE.

a. Contractor shall have control of the defense with counsel reasonably acceptable to OSU, except that: (i) OSU may join the defense with its own counsel and at its own expense if OSU determines there is a conflict of interest or there is an important government principle at issue, and (ii) OSU'S consent is required for any settlement that requires OSU to pay any money, does not release OSU from all liability from the claim, or adversely affects OSU's interest.

6. LAWS AND POLICIES:

A. APPLICABLE LAW; JURISDICTION AND VENUE.

a. The laws of the State of Oregon (without giving effect to its conflict of laws principles or laws) govern all matters arising out of or relating to the Contract, including, without limitation, its validity, interpretation, construction, performance or enforcement. Any party bringing a legal action or proceeding against the other party arising out of or relating to this Contract shall bring the legal action or proceeding in the Circuit Court of Oregon for Benton County.

b. Notwithstanding paragraph (a), if a legal action or proceeding must be brought in a federal forum, the party shall bring the legal action or proceeding in the United States District Court for the District of Oregon. This paragraph does not authorize Contractor to bring a legal action or proceeding against OSU in a federal forum except to the extent Congress has validly abrogated OSU's sovereign immunity. This paragraph is also not a waiver by OSU of any form of immunity, including without limitation sovereign immunity and immunity based on the Eleventh Amendment to the United States Constitution.

c. Except as set forth in paragraph (b), the parties consent to in personam jurisdiction in the above courts and waive any objection to venue and any objection that the forum is inconvenient.

B. COMPLIANCE WITH APPLICABLE LAWS AND POLICIES.

a. The parties shall at all times comply with all applicable federal, state and local laws, regulations, executive orders and ordinances pertaining to their respective businesses, products or services, employment obligations, and the subject matter of this Contract. The parties shall at all times

comply with all applicable standards and policies of OSU, including without limitation any such laws or regulations regarding employment discrimination. If this Contract is being funded with federal funds, Contractor agrees to comply with all applicable federal contracting statutes, regulations and policies.

- b. Without limiting the generality of the foregoing, Contractor expressly agrees to comply with the following laws, regulations and executive orders to the extent they are applicable to the Contract: (i) Titles VI and VII of the Civil Rights Act of 1964, as amended; (ii) Paragraphs 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) ORS Chapter 659, as amended; (ix) the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g; (x) the Health Insurance Portability and Accountability Act requirements noted in OAR 125-055-0115; (xi) the Oregon Consumer Identity Theft Protection Act, ORS 646A.600-646A.628; (xii) all regulations and administrative rules established pursuant to the foregoing laws; and (xiii) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations. These laws, regulations and executive orders are incorporated by reference herein to the extent that they are applicable to the Contract and required by law to be so incorporated.

C. FEDERALLY REQUIRED PROVISIONS.

- a. Equal Employment Opportunity – Contractor shall comply with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."
- b. Rights to Inventions Made Under a Contract or Agreement – If this Contract is for the performance of experimental, developmental, or research work, the Federal Government and OSU have rights in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
- c. Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), as amended – If this Contract provides for payments in excess of \$100,000, Contractor shall comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251 et seq.). Violations shall be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
- d. Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) – Contractors who apply or bid for an contract of more than \$100,000 shall file a certification that it will not and has not used Federally appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, officer or employee of Congress, or an employee of a Member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Contractor shall require any subcontractor who applies or bids for subcontract in excess of \$100,000 to provide a similar certification to the next higher tier (Contractor or subcontractor as applicable). Each tier shall also disclose any lobbying with non-Federal funds in connection with obtaining any Federal award. Contractor or subcontractor must forward any disclosures from tier to tier up to OSU.
- e. Debarment and Suspension (E.O.s 12549 and 12689) - No contract shall be made to parties listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Nonprocurement Programs in accordance with E.O.s 12549 and 12689,

"Debarment and Suspension." This list contains the names of parties debarred, suspended, or otherwise excluded by agencies, and contractors declared ineligible under statutory or regulatory authority other than E.O. 12549. If this Contract is in excess of the small purchase threshold, Contractor hereby certifies they are not listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Nonprocurement Programs.

D. PUBLIC RECORDS LAW NOTICE.

OSU advises Contractor that information OSU receives may be subject to public inspection under Oregon Public Records Law (ORS 192.410-192.505).

E. SAFETY AND HEALTH REQUIREMENTS/HAZARD COMMUNICATION.

Services supplied under this Contract shall comply with all federal Occupational Safety and Health Administration (OSHA) requirements and with all Oregon safety and health requirements, including those of the State of Oregon Workers' Compensation Division. Contractor shall notify OSU prior to using products containing hazardous chemicals to which OSU employees may be exposed. Products containing hazardous chemicals are those products defined by Oregon Administrative Rules, Chapter 437. Upon OSU's request, Contractor shall immediately provide Material Safety Data Sheets, as required by OAR ch. 437, for the products subject to this provision.

F. EXPORT CONTROL.

Contractor acknowledges that OSU has students and faculty who are foreign nationals who may work with the services, product or technology received from Contractor pursuant to this Contract. Contractor represents that it has informed OSU in writing, prior to executing this Contract if it is providing OSU any product or technology subject to the U.S. Export Administration Act of 1979, the Export Administration Regulations and the International Traffic in Arms Regulations, and if so, under what Commerce Control List number(s) or U.S. Munitions List number(s) it is controlled.

G. FIREARMS POLICY.

OSU has adopted a policy that prohibits Contractor and Contractor's employees, agents, and subcontractors from possessing firearms on OSU property.

H. PARKING.

Contractors doing business on the OSU campus may be required to have a permit to park if utilizing restricted street parking or parking lots. Contractor parking permits may be obtained through OSU's Office of Transit & Parking Services.

I. SEXUAL HARASSMENT POLICY.

OSU has policies that prohibit sexual harassment of members of the OSU community and in keeping with those policies Contractor and Contractor's employees, agents, and subcontractors are prohibited from engaging in sexual harassment of members of the OSU community.

J. SMOKING POLICY.

OSU has a policy that prohibits Contractor and Contractor's employees, agents, subcontractors from smoking on the OSU campus or other OSU owned property. The smoking prohibition includes all indoor and outdoor spaces.

K. WEBSITE ACCESSIBILITY.

If Contractor is designing or developing web page(s) for OSU under this Contract, Contractor shall design and develop (as applicable) the web page(s) in conformance with OSU's Policy on Information Technology Accessibility available at <http://oregonstate.edu/accessibility/ITpolicy>.

7. GENERAL TERMS AND CONDITIONS:

A. ORDER OF PRECEDENCE.

In the event of a conflict, all the terms and conditions of this Contract, its exhibits, and any

amendments thereto supersede all terms and conditions on any forms used by the Contractor.

B. NO THIRD PARTY BENEFICIARY.

OSU and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third parties

C. ASSIGNMENT/SUBCONTRACT/DELEGATION.

Contractor shall not assign, subcontract, delegate or otherwise transfer any of its rights or obligations under this Contract, without the prior written approval of OSU. Any assignment of rights or delegation of duties is prohibited under this Section, whether by merger, consolidation, dissolution, operation of law or any other manner. Any purported assignment of rights or delegation of duties in violation of this Section is void. OSU's consent to delegation does not relieve Contractor of any of its performance obligations.

D. WAIVER.

No waiver of an obligation under this Contract is effective unless it is in writing and signed by the party granting the waiver. No failure or delay in exercising any right or remedy, or in requiring the satisfaction of any condition under this Contract operates as a waiver or estoppel of any right, remedy or condition.

E. ACCESS TO RECORDS AND AUDIT.

Contractor shall maintain accurate books, records, documents, and other evidence (collectively, "Records") following accounting procedures and practices sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. Contractor shall permit OSU and the federal government and their respective duly authorized representatives to have access to the Records that are directly pertinent to this Contract for the purpose of conducting an audit, or other examination, or for creating excerpts or transcripts. Contractor shall maintain Records for OSU's review for at least six years beyond the term of the Contract. Contractor shall promptly remedy any discrepancies involving deviation from the terms of this Contract and shall promptly reimburse OSU for any commitments or expenditures found by OSU to have been in excess of amounts authorized by OSU under this Contract.

OSU shall have the right to an independent third-party audit of the Contractor's records associated with or related to the goods or services provided for under this Contract. OSU may request an independent third-party audit no more than one time per calendar year. OSU will determine the time-period that will be the subject of the audit. However, the entire term of the Contract, including the original term and any subsequent renewals or extensions, may be the subject of the independent third-party audit at any time. Contractor shall bear the full cost of such independent third-party audit.

F. GOVERNMENT EMPLOYMENT STATUS.

Contractor certifies that either (a) it is not currently employed by OSU or the federal government; or (b) if Contractor is so employed, Contractor has fully disclosed to OSU in writing such employment status, is in full compliance with any statutes, regulation, and OSU or the federal government policies regarding employee contracting, and agrees to indemnify and hold harmless OSU for any failure by Contractor to comply with such statutes, regulations, or policies.

G. INDEPENDENT CONTRACTOR STATUS.

The services to be rendered under this Contract are those of an independent contractor. OSU reserves the right (a) to determine and modify the delivery schedule for the services and (b) to evaluate the quality of the services; however, OSU may not and will not control the means or manner of Contractor's performance. Contractor is responsible for determining the appropriate means and manner of performing the services. Contractor is not an officer, employee or agent of OSU as those terms are used in ORS 30.265. Contractor has no authority to act on behalf of OSU and shall not purport to make any representation, contract, or commitment on behalf of OSU.

H. NOTICE.

- a. A party giving or making any notice, request, demand or other communication (each a “Notice”) pursuant to this Contract shall give the Notice in writing and use one of the following methods of delivery: personal delivery, United States Postal Service Registered or Certified Mail (return receipt requested and postage prepaid), overnight courier (with all fees prepaid), facsimile or e-mail to the other party’s address as listed on the signature page of this Contract. Notice to OSU is to be delivered to the Contract Administrator and Departmental Administrator except where this Contract expressly directs or permits delivery of Notice to a different Department.
- b. Notice is effective: (i) if given by facsimile, upon receipt by the sending party of an appropriate facsimile confirmation; (ii) if given by e-mail, by confirmation of receipt by return e-mail, which is not satisfied by an automatically-generated message that the recipient is out of the office or otherwise unavailable; or (iii) if given by any other means, when delivered at the address specified in this Section.

<u>OSU Contract Administrator</u> OSU PCMM ATTN: JD186163IP Contract Administrator 644 SW 13 th Street Corvallis, OR 97333 Telephone: (541) 737-3572 Fax: (541) 737-2170 E-mail: pacs@oregonstate.edu	and:	<u>OSU Departmental Administrator</u> [Name] [Title] [Address] [City, State, Zip] Telephone: [Phone Number] Fax: [Fax Number] E-mail: [E-Mail Address]
---	------	---

CONTRACTOR Contract Administrator
[Name]
[Title]
[Address]
[City, State, Zip]
Telephone: [Phone Number]
Fax: [Fax Number]
E-mail: [E-Mail Address]

I. OSU NAME AND TRADEMARK.

Contractor shall not identify this Contract, nor use OSU’s names, trademarks, service marks, or other proprietary marks in any of Contractor’s marketing material, advertising, press releases, publicity matters or other promotional materials without the prior written consent of OSU, which consent may be withheld in OSU’s sole discretion.

J. RECYCLED PRODUCTS.

Contractors will use recycled products, as defined in ORS 279A.010(1)(ii), to the maximum extent economically feasible in the performance of the Contract.

K. SALES AND USE TAXES.

OSU shall pay all applicable sales, excise, or use taxes in connection with this Contract. Invoices shall separately identify all such taxes and shall include either Contractor’s sales tax or use tax permit number. Contractor shall be responsible for all other taxes, including taxes based upon Contractor’s income. Contractor shall indemnify, defend, and hold harmless OSU from and against any interest, penalties, or other charges resulting from the non-payment or late payment of taxes or other charges for which Contractor failed to invoice OSU or which Contractor otherwise failed to pay in a timely manner.

L. FORCE MAJEURE.

Neither party is responsible for delay caused by an act or event that prevents the party from performing its obligations under this Contract where such cause is beyond the party’s reasonable control and the nonperforming party has been unable to avoid or overcome the act or event by the

exercise of due diligence. Such acts or events include without limitation fire, riot, acts of nature, terrorist acts, or other acts of political sabotage or war. Contractor shall make all reasonable efforts to remove or eliminate such a cause of delay and shall, upon cessation of the cause, diligently pursue performance of its obligations under this Contract. However, if delay due to a force majeure event continues for an unreasonable time, as determined by OSU, then OSU is entitled to terminate the Contract.

M. EXECUTION AND COUNTERPARTS.

This Contract may be executed by facsimile or PDF and in two or more counterparts, each of which shall be deemed an original and all of which together shall constitute one instrument.

N. SURVIVAL.

The terms and conditions of this Contract that by their sense and context are intended to survive termination or expiration hereof shall so survive.

O. SEVERABILITY.

If any provision of this Contract is determined to be invalid, illegal or unenforceable, the remaining provisions of this Contract remain in full force and effect if the essential terms and conditions of this Contract for both parties remain valid, legal and enforceable.

P. MERGER.

This Contract, including all documents referred to herein and attached hereto, constitutes the entire agreement between the parties and supersedes all prior representations, understanding and agreements between the parties. It is the complete and exclusive expression of the parties' agreement on the matters contained in this Contract. No amendment, consent, or waiver of terms of this Contract shall bind either party unless it is in writing and signed by authorized representatives of each of the parties. Any such amendment, consent, or waiver is effective only in the specific instance and for the specific purpose given.

8. CERTIFICATIONS AND SIGNATURES:

This Contract must be signed in ink by an authorized representative of Contractor. The undersigned certifies under penalty of perjury both individually and on behalf of Contractor that:

- A. The undersigned is a duly authorized representative of Contractor, has been authorized by Contractor to make all representations, attestations, and certifications contained in this Contract and to execute this Contract on behalf of Contractor and that this Contract, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms;
- B. Contractor is not a contributing member of the Public Employees' Retirement System and will be responsible for any federal or state taxes applicable to payment under this Contract. Contractor will not, by virtue of this Contract, be eligible for federal Social Security, employment insurance, workers' compensation or the Public Employees' Retirement System, except as a self-employed individual.
- C. Pursuant to OSU Standard 580-061-0030 Contractor has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts;

Each of the parties has caused its duly authorized representative to execute this Contract on the date set forth in its respective signature block below.

CONTRACTOR:

Signature: _____

Date: _____

By: _____

Title: _____

OSU:

Signature: _____

Date: _____

By: _____

Title: _____

**EXHIBIT B
CERTIFICATIONS**

By signature on this certification the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS

The undersigned hereby certifies under penalty of perjury that the Proposer, to the best of the undersigned's knowledge, is not in violation of any tax laws described in ORS 305.380(4).

SECTION II. AFFIRMATIVE ACTION

The undersigned hereby certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to OAR 580-061-0030 (3).

SECTION III. COMPLIANCE WITH SOLICITATION

The undersigned agrees and certifies that they:

1. Have read, fully understands and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal; and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or Contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the Request for Proposal and the Contract; and
4. Has provided a correct Federal Employer Identification Number or Social Security Number with Proposal.

SECTION IV. PERMISSIVE COOPERATIVE PROCUREMENTS

If Proposer is awarded a contract from this Request for Proposal, Proposer hereby (check one)

- agrees
- disagrees

to offer the resulting contractual terms and prices to other public institutions.

Authorized Signature: _____ Date: _____

Name (Type or Print): _____ Telephone: (____) _____

Title: _____ Fax: (____) _____

FEIN ID# or SSN# (required): _____ Email: _____

Company: _____

Address, City, State, Zip: _____

Construction Contractors Board (CCB) License Number (if applicable): _____

Business Designation (check one):

- Corporation Partnership LLC Sole Proprietorship Non-Profit

**EXHIBIT C
REFERENCES**

REFERENCE 1

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

REFERENCE 2

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

REFERENCE 3

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

**EXHIBIT D
PRICING**

Phase 1 Pricing:

Draft JIRA Workflows, Screens, Post-Functions (including validation) and supporting reference documentation for the Change Management JIRA Project. \$_____

Finalized Custom Atlassian JIRA Workflows, Screens, Post-Functions (including validation) and supporting reference documentation for the Change Management JIRA Project.
\$_____

HipChat & Application Links Deployment \$_____

JIRA and Confluence Training \$_____

Supplementary Information for Ongoing Support 'Phase 2' of this solicitation (not scored under the pricing portion of the evaluation criteria listed in RFP Section 5.2, however this will be reviewed and is subject to negotiation if proposer is selected)

Phase 2 Pricing

Ongoing Support

Discipline	Hourly Rate
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Executive summary

We would like to thank **Oregon State University** for their partnership in sharing the information that is needed to compile this [findings and recommendation report](#). We believe you are very open to leveraging the Atlassian toolset and making them work for you and your team. We're confident that by adopting new practices and deploying these tools in a clean and managed capacity that you'll achieve a high adoption rate and success at scaling your system.

During our onsite time and subsequent reviews, we have broken down our findings and recommendations into topic-specific sections. We also have been looking closely at specifics that your team was investigating, having issues with, or were hoping could be deployed. Please accept our report and take time to compile questions around any of the information presented here.

Consultation Introduction

Oregon State University requested a findings and recommendations for their implementation of the Atlassian tools. The findings and recommendations are split into the following few sections:

- JIRA
- Confluence
- Support
- Other Issues

The OSU Regional Class Research Vessel Project Office is tasked with managing a project to build the Regional Class Research Vessel. This is a high visibility project with oversight from the National Science Foundation and ultimately, Congress. A Risk Reserve fund has been set aside for contingencies to reduce the chances of cost over-runs on the project. A successful, transparent Change Management System to manage Contingency funds is an important tool for the RCRV Office. The Team has created a change management system that works for them, but they are looking for something that will be simpler, more flexible and provide the required level of transparency. In addition, they would prefer to devote their limited time and human resources to managing the project itself rather than the Project Management tools. Further, the tool's capabilities must match the requirements as the Project Manager wants to avoid "square pegs."

The team consists of approximately 15 people. Demian Bailey, the Project Manager, has described the team as high functioning, but with limited knowledge of the tools they use and they don't have much time to learn them. The team does have some knowledge of Agile processes and uses them to some extent, e.g. Story Points for planning work. Although the team does have some knowledge of JIRA and Confluence, they don't have anyone with the time or the skills to manage the tools and provide support. Chris Rosmos, the Data Presence Engineer has been covering some of this but he has other duties that require his attention as well.

We started this engagement by spending time with various teams and interviewing them about their current usage and experience with the JIRA tool. Once we understood their use-case and needs we further investigated their current usage of the tool. These details have helped build this findings and recommendations document.

Overview

Current System:

The team currently uses Filemaker to create the requests and a Word Document as a check list to ensure the process is followed. The check list consists of 42 separate items and check boxes to indicate the status of the task (completed/not), whether the database has been updated, and the results of decisions (Approved/Disapproved, Endorsed/Not Endorsed, Yes/No) as well as the POC, notes and Date Complete.

The Change Management Process:

The main thing they would like to track is the change management process for approving and allocating Risk Reserve funds from the Contingency budget. This would include things like change orders, suppliers going out of business, etc. The process has two distinct, linked processes that will need to be translated to workflows.

The first is the RCRV Contingency Control Process. In this process, the Risk is identified by the Shipyard, entered into the database and a CCR gets created by OSU Staff. The next steps depend on the cost of the change. For Level 3 changes, the CCR will go through the process to Contingency Transfer Control Process. For Level 2 changes, the next step is approval by the PM. If the CCR is approved, the CCR goes into the CTC process. Otherwise, it must go through a CCB process and be approved by the NSF.

Once the CTC process has been completed, an RFP is submitted to the shipyard who reviews the scope, submits a proposal. The proposal goes through another approval process that can include negotiations until a change order is created and the money is drawn from contingency funds. At this point, the process re-enters the CTP process for distribution, budget updating and subsequent invoicing.

The second is the CTC Process. This process essentially consists of the Project Office submitting requests, submitting them to OSRAA for review and Accounting Approval and updating Primavera (used to track Contingency Budget).

Demian's vision is that all of this could be done internally (i.e. via JIRA, with documentation in Confluence). He would also like existing Vendor Comments transferred over to JIRA.

JIRA

Findings

The team has a 10-user License for JIRA 7.1.17 with 4 users in the system. JIRA sits on a local server with its own Tomcat container. Application Links are not configured between JIRA and Confluence. Access is controlled by adding users to the local directory. They don't envision the JIRA instance getting large enough for Crowd to be necessary. Based on their identified goals, it seems likely that 10 users will quickly become insufficient, particularly given their goal of managing all requests through JIRA will increase the number of individual who will require access.

The instance is currently small with 3 projects and 35 issues (as of 26 September 2016). Backups are configured.

They have set up 3 projects, mostly using the configuration created by JIRA at Project Creation. They have also created 12 custom fields. Based on their needs and the complexity of the change management process, default configurations won't generally be appropriate to their needs. They will require at least two custom workflows with a variety of validators and post-functions to make the process manageable. Also, they will need a number of custom fields of various types to capture all of the information they require.

The team does not appear to be using any Agile Boards or Dashboards other than the default dashboards. Although the team doesn't use Agile per se, Kanban boards would be useful for seeing the status of current requests at a glance. In addition, the team didn't seem to have worked with JQL much.

Recommendations

There are several things that should be done to prepare your JIRA instance for the intended use:

1. Create a Change Management project. Although we haven't gotten into project design yet, the documentation provided suggests the following:
 - a. CCR, CTR, Task and Sub-Task Issue types.
 - b. Custom Workflows: The CCR and CTR workflows will be constructed based on the documentation provided by OSU. These workflows will include post function, validators and conditions necessary to capture all the steps in the checklist.
 - c. Custom Fields: JIRA gives project designers several options for creating custom fields that are relevant and useful. Types include single, multiple and cascading select lists; Radio buttons and check boxes are good for indicating things like whether an action has been performed or something is required; JIRA also has fields that allow you to choose users, dates or versions and Free Text fields for input that can't be pre-formatted.
 - d. Field Configuration Schemes: Field Configurations allow project designers to make certain fields required as well as adding descriptions or instructions for each field. Field configurations can be configured for a single or all issue types in a project. In addition, the same scheme can be used across multiple project if desired.
 - e. Custom Screens and Screen Schemes: JIRA allows project designers to present different screens to users when an issue is created, edited or viewed. In addition, screens can be built to show up when specific transitions are executed. As with all schemes, these can be used for one or many issue types in a single project and can be re-used in other projects.
 - f. Roles and Permission Schemes: Roles are where users with similar requirements or duties get grouped together in a project. These roles can be used to assign all individuals in that role specific permissions (e.g. transitioning or editing issues), providing notifications, or only allowing certain users to transition an issue. Roles can also be used as the basis for Notifications. Thoughtful use of Roles ensures that users can see and do what they need to without being troubled by excessive notifications.
2. Create an Internal Support Project: As JIRA starts becoming more widely used, you will need a way for users to contact System Administrators when they have issues or requests. Setting up an Internal Project with a variety of issue types such as Request, Access and Help will help the process of transitioning into JIRA and improve the user experience as a whole.

In addition, the following things will expand the utility of your JIRA instance:

1. Set up Application Links between JIRA and Confluence. JIRA issues can be shown in Confluence and JIRA issues will show spaces where JIRA issues are mentioned in Confluence. This makes collaboration, planning and tracking work more efficient by bringing more relevant information into the same place.
2. Build Kanban boards: JIRA Agile has Kanban and Scrum boards built in. These boards are great for seeing where large groups of issues are at a glance. The issues shown on the Boards can be fine-tuned through JQL filters.
3. Consider upgrading to a 25 user JIRA license. There are not enough users in your license to provide access to your entire team, plus external Administrators. Work with OSU to obtain the 50% Academic Discount. In addition, we can provide license management services for all of your Atlassian products so you don't have to worry about keeping licenses current

Confluence

Findings

The team has been using Confluence for about three years and currently has Confluence 5.8.15 with 73 users. The Confluence instance has 11 spaces total, with 8 being Site Spaces and 3 Personal Spaces. There is a considerable amount of content in these spaces which is consistent with Demian's observation that it is basically being used as a file structure.

It appears that Confluence is not being used to anywhere near its full potential:

- Application Links between their JIRA and Confluence instances that would allow them to collaborate and track information more efficiently are not set up.
- Demian stated that many of the users seem uncomfortable editing Confluence pages or adding remarks. Demian is aware that this is an issue and is keenly interested in changing it. He stated that he would like to get user training to help them understand how to use the tool properly, and indicated that having a Contractor review and optimize their Confluence instance might be a good idea.

Recommendations

Spaces are team and output oriented. The ability to pre-define templates for content allow us to create similar looking content over and over. This is seen heavily with the default, included templates –

- Meeting Notes
- Retrospective
- Product
- Requirements
- Decision, etc.

The ability to easily record meeting notes and action items in Confluence, alongside retrospectives and decisions, is invaluable. The content is forever searchable and no longer constricted to email or document storage systems. Confluence natively indexes Word documents, Excel documents, or other files. This means that if your team uses Confluence for file storage, those files are searchable alongside content and notes.

We recommend a more in-depth examination of your Confluence instance to help you make the most use of it.

In addition, Confluence is a good place to document your operating procedures, system configurations, any sort of scripts or source codes used and contact lists. Once this is in place, users will know where to go to get questions answered.

Support

Findings

The team doesn't currently have anyone dedicated to support. This duty is largely being shared between Demian and Chris. However, both of them are busy with other aspects of the project and neither has a lot of experience managing JIRA.

The lack of dedicated resources to maintain and support a JIRA instance will make it difficult for them to manage user accounts, resolve issues, perform required maintenance such as updates or reviewing logs, or creating/modifying projects as the need arises. This can lead to degradation of the performance and usability of the instance over time. In addition, a dedicated support team with an Internal Support project reduces the number of required Administrator accounts, which improves the security, usability and performance of the instance.

Demian stated that he would prefer to have a Contractor do this for them if necessary, including ssh access so we can handle back-end work.

Recommendations

Good support is key to keeping Atlassian products running properly, responding to user requests and resolving issues. We recommend that you get some sort of support system in place. We find that a minimum of 10 hours a month is needed to provide a base level of support. This should include personnel who have full access to your system and the knowledge to respond to issues. The things support personnel will do include:

- **Upgrades:** New feature sets for increased productivity and upgraded applications run better than previous versions. For example, JIRA releases major updates once to twice a year with a year typically between major revisions. Best practice is to create a development environment specifically used for testing major system changes.
- **Plug-ins:** Since plug-ins are developed and maintained by different companies, there is no set cadence for plug-in updates. However, it is generally a good practice to check and install any plug-in updates at least monthly.
- **Responding to user requests and issues:** Higher rates of user adoption commonly lead to an increase in user issues and requests. The nature of these requests can include things like access requests, customizations, users not being able to do something or users wanting to report too many notifications. Timely response to these requests will improve the user experience as a whole.
- **Document your system and procedures in Confluence** so users have a place they can go to get questions answered.

Other issues

Findings

- Demian stated that user training is an issue, and that he would like to bring in some trainers if possible.
- The team currently uses iMessage for internal chat. They are interested in possibly using HipChat, but have been unable to get it working properly.

Recommendations

- Set up training for you based on your needs and availability
- Set up a HipChat instance and integrate it with your JIRA instance.