



# Offeror Questionnaire – Qualifications

STATE OF ARIZONA

Agency: Arizona Dept. of Administration  
State Procurement Office (ADOA/SPO)  
Customer: WSCA participating states; AZ Statewide  
(state agencies & cooperative partners)

Description: **WSCA Software Value-Added Reseller**

**Instructions:** Complete each item, using attachments where necessary. Attachments shall indicate the item number and heading being referenced as it appears below. *Please note: Please respond to all questions, even if your answer may be 'Not Applicable'.* Label your response "Questionnaire-Qualifications-companyname" and indicate the question number that is being addressed. Your narrative response is limited to 15 pages. All attachments under this header should be labeled, "Questionnaire-Qualifications-companyname-Attachments". Attachments are not included as part of the page total. Responses should be comprehensive but concise, addressing specifics with minimal extraneous information. Charts and graphs may be utilized to outline specific information, such as an organization chart or current client list, where appropriate. All materials must be in electronic format that can be received in ProcureAZ, the State of Arizona's electronic procurement system (See Special Instructions). **ANY NARRATIVE LANGUAGE RECEIVED IN EXCESS OF THE PAGE QUANTITY INDICATED WILL NOT BE CONSIDERED AS PART OF THE PROPOSAL.**

## QUALIFICATIONS:

1. Provide an overview of the organization, including its structure, number and location of offices. Include an organizational chart to show the lines of responsibility at the highest levels. Provide a short history of your organization. Include number of years in business, industry awards, and corporate trade affiliations (publisher certifications are addressed in #2). This solicitation is for the products and services offered by a Software Value-Added Reseller (SVAR (Yes/No)). Is your organization a SVAR? If not, please describe the nature of your business (e.g., LAR)

**Xerox Corporation Overview – For more than a half a century, Xerox has been a leader in document technology and services. We continue to build on this heritage of innovation. Through our acquisition of Affiliated Computer Services, we now are the world's leading enterprise for business process and document management. With 9,400 active patents, we are dedicated to innovation. We are allied with IT and business partners that integrate our systems and services into your solutions. An Organizational Chart of Xerox Corporate Officers is below.**



Note:  
This chart is illustrative only and does not show all organizations or reporting relationships.  
Effective August 2010.

## Locations and Organization -

**In the US, Xerox Sales and Service have multiple locations in all 50 states and the District of Columbia . We also have administrative offices, manufacturing facilities and research facilities in varying states as well. Internationally, customers have access to Xerox products.**



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**History** – Founded in 1906 as the Haloid Company, named Haloid Xerox in 1958 and Xerox Corporation in 1961; acquired Affiliated Computer Services in 2010, transforming Xerox into the world leader in business process and document management. Xerox receives hundreds of industry awards each year, recognizing our focus on Quality, Environmental awareness, Technology, Service and many other notable recognitions such as Best Company to work for and Xerox made Fortune Magazine's highly respected list of "Most Admired Companies". Most recently, Buyers Lab Inc. awarded 4 ½ stars and recognized Xerox Corporation's latest DocuShare offerings – DocuShare™ CPX, DocuShare™, and DocuShare™ Express – with the prestigious 2011 Winter Pick award for "Outstanding Document Management Solution".

Of the software contained in the Xerox response, Xerox is either the publisher or Xerox is an authorized partner and approved distributor as noted on the Pricing Sheet = Rates by Publisher. Also please refer to #8 below. Further detail of the Xerox Software Partnership Program can be provided.

2. Using Excel file 'Questionnaire–Qualifications, RepPublishers', please advise of the publisher accounts for which you are an authorized reseller. Using this same Attachment, advise of those publishers for which you are not an authorized reseller, and briefly explain why you are not a reseller for those publishers. A contract requirement states that the Contractor must agree that there are no software publishers with whom they would refuse to do business if the Software Publisher is willing to do business with them. Please affirm that you agree with this requirement or state your objection and provide an explanation for requesting a modification of this requirement, providing names of publishers your organization would not represent and the reasons why. Provide written proof of your reseller status (certifications) with individual publishers as attachments to your response. **N/A Xerox is the Publisher.**
3. Describe the company's experience and expertise providing the following services.
  - a. License Management **All Xerox acquisitions are captured electronically at inception in a centralized customer data base providing ease in recalling a wide range of data fields at any given time.**
  - b. Account Management (assume 'accounts' as equivalent to a state contract, and to a using municipality) **All revenue and transactions and service/support activities are captured, maintained and updated in a centralized data base offering a wide range of account management information. This is one big advantage of dealing directly with the publisher.**
  - c. Training **Part of the process to bring each product-to-market is the development of training materials from e-learning to formal training sessions conducted by Xerox professional trainers. Training activities take place internally as well as externally.**
  - d. Software Consultation **Xerox Consultants and tenured Software Engineers attend extensive training and on-going technology education as required to maintain industry expertise.**
  - e. Other (Specify) **Workflow Assessment: Xerox Corporation and the DocuShare Business Unit have over 15 years of relevant business experience in workflow assessment and taxonomy design for structuring digital content in a manner to be used easily and efficiently. Xerox and the DocuShare Business Unit can help you find and improve bottlenecks and inefficient processes within your organization. A Xerox Document Workflow Assessment looks at specific areas and departments that you recommend. We perform quick interviews with key personnel and map out current processes that are inefficient. We then look to see how we could improve these processes saving you both time and money. We pay particular attention to manual intensive document processes and how they're currently performed. We then understand the environment and look for ways to improve the process. This could be as simple as enabling a feature on the Xerox MFDs to re-designing the entire workflow from start to finish. No area is too big or too small.**
4. Clients
  - a. Provide information on your current government client list. In addition, explain the services you provide to each client and how long you have been working with each one. **Xerox has long been a major supplier of equipment, software and services for Federal, State, and Local Governments with a division dedicated solely to government.**
  - b. List government contracts you have gained over the past three years and provide an explanation of why your company was chosen. The WSCA Multifunction Contract Award currently contains some software offerings that are value add to our product offerings. **To date we have WSCA PA's with 12 states/entities for the multifunction contract which contains some software offerings. In addition we have WSCA PA's with most states which contain the Xerox printer and small multifunction products. This is in addition to multiple state or local contracts throughout almost every state. A detailed list can be provided upon award.**
  - c. List government contracts you have lost or resigned over the past three years and provide an explanation of why your company lost or resigned these accounts. **Out of respect for the privacy and wishes of our customers and our commitment to honor their confidentiality, we are not at liberty to reveal specific customer**



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**information at this time. Upon request during the formal decision process direct contact and/or information exchange will be arranged by mutual consent.**

- d. If you have no government clients, note this in your response and answer questions A, B, and C based on non-government clients. **N/A - Xerox has government clients. Roughly 30% of the total Xerox revenue comes from our government accounts. Please see A, B, C above.**
- e. Provide the agency/company name, contact name, email address and telephone number for three client references. Providing this information shall constitute your permission for the Procurement Officer to contact the clients to discuss your work and your working relationship with them. **Per 4c, the following have agreed to provide contact information at this time:**

**City of Newark**  
Sherronda Carroll  
Systems Analyst, Project Manager  
[carrolls@ci.newark.nj.us](mailto:carrolls@ci.newark.nj.us)  
Systems Analyst, Project Manager  
973-733-4446

**PA Department of Public Welfare**  
Shane Moure  
Enterprise Content Management Unit – Chief  
[shmoure@state.pa.us](mailto:shmoure@state.pa.us)  
(717) 787-4592

**Upper Merion Area School District**  
Gary Parkansky, Director of Purchasing  
[gparkanzky@umasd.org](mailto:gparkanzky@umasd.org)  
(610) 205-6414

- 5. Accuracy in Quotes and Billings; Audits. Pricing for software in this contract is largely based on pre-order, firm quotes, which in turn are based on a contract rate multiplied by your cost from publishers. Such quotes may be automatically provided online, or may – as a result of SVAR’s negotiation with the publisher for reduced cost – be less than a price that would be automatically calculated.
  - a. Describe your system and controls to ensure your actual costs to obtain the product are used as a basis for the quotes and resultant invoices. **Pricing and Pricing Methodology will be provided.**
  - b. Provide a sample invoice (of a product sold under a similar pricing model). **Sample invoice has been provided as an attachment.**
  - c. Describe your cost accounting system for tracking employee hours on an hourly service rate invoice, and provide a sample hourly-rate invoice. **Xerox uses the Order Management Tool (OMT) as a closed-loop system accounting for all employee hours on a professional services contract. Customers can be supplied reporting of these hours in addition to standard invoicing prepared from this system.**
  - d. Describe how you audit your billings for accuracy. Explain how you would work with a Participating Entity (PE) who is conducting an audit of their purchases through you. ~~e-cost Provide information on your current government client list. In addition, explain the services you provide to each client and how long you have been working with each one.~~ **Xerox is fully capable of providing accurate and concise data in support of our internal audit processes as well as those of our customers. As mentioned above in 3b, we maintain multiple data bases of information beginning with the electronic capture of the initial placement of an order through the life cycle of the subsequent activity followed by an archival period at the end of the transaction. Information easily can be drawn from the data bases in support of various audit requirements.**
- 6. Provide Key Personnel Information for this contract as a whole, and, as feasible, for any States who indicated their Intent to Participate, including brief biographies. Explain how the redundancy of account management will cover vacations, illness or resignations. **Annie Van Gilder, who currently manages the WSCA Contract, will assume responsibility for this Software contract as well. As each Participating Agreement is signed, there will be a single point of contact named for that given state.**
- 7. Provide information which demonstrates your organization’s financial stability, such as independent audited financial statements from the last three (3) years. The State may request additional information pertaining to your financial stability as deemed necessary. Proposals which do not include sufficient information regarding the organization’s financial stability may be negatively impacted. **With revenues of 22 billion, we are the world’s leading enterprise for business process and**



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**document management. 2010 Annual Report was published April 8, 2011 and the Audited Consolidated Financial Statement is attached.**

8. Provide information on any subcontractors you propose to use on this contract, including approximate percentage of work directed to subcontractor, proposed work that subcontractor will perform, subcontractors' Minority or Woman-Owned Business status, resumes of their key personnel, etc. **Xerox has sales responsibility through our direct sales organization and our Xerox Sales Agents program. All contract management and sales support including software license management, training, maintenance and updates are performed directly by Xerox. Additionally, should an entity wish to lease any of the Xerox offerings, this too would be handled directly by Xerox.**