

State of Florida
Department of Elder Affairs
Invitation to Negotiate (ITN)
Number DOEA FL eCIRTS ITN #18-ITN-001-JT
Enterprise Client Information and
Registration Tracking System (eCIRTS) Project
Software and System Integrator Services

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Failure to file a protest within the time prescribed in Section 120.57(3), F.S., or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, F.S.

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SECTION 1 INTRODUCTION

1.1 Purpose

Pursuant to Section 287.057, Florida Statutes (F.S.), the Department of Elder Affairs' (Department or DOEA) Enterprise Client Information and Registration Tracking System Project (eCIRTS or Project) seeks Replies to this Invitation to Negotiate (ITN) from qualified vendors (Respondents) to obtain the best and most appropriate means of providing Software and System Integrator (SSI) Services for a new client management solution (Client Management Solution or the Solution). The State of Florida (State) desires an integrated enterprise Client Management Solution that allows the State to organize, define, and standardize its client management processes and that complies with Chapters 400, 415, 429, 430, 744, and 825, F.S.

The purpose of this ITN is to replace the current Client Information and Registration Tracking System (CIRTS). The Scope of Services requested is set out in Attachment B – Project Specifications and the Business Requirements presented in the eCIRTS Business Process Reengineering Document and Requirements Traceability Matrix.

This ITN does not include functionality that duplicates the Department business processes related to any of the functions included in the Agency for Health Care Administration's (AHCA) Florida Medicaid Management Information System (FMMIS).

1.2 Background

CIRTS consists of a series of technical components performing various client, provider, and administrative functions for the State. The current system supports the business aspects of the Department's Division of Statewide Community-Based Services and local Area Agencies on Aging client management functions. See Attachment A – Overview of the Current DOEA Program for more information on CIRTS.

In 2017, the Department procured the services of an independent consulting firm with experience in planning public sector technology projects. This firm provided the Department with a comparative analysis of current market solutions meeting DOEA's required functionality requirements (see CIRTS Market Analysis) to recommend potential replacement solution options for CIRTS. The Analysis includes the following:

- A description of the Department's strategic goals, objectives, and priorities which the proposed system will support;
- A description of the strategic business needs the proposed system must address;
- A baseline analysis including the current business processes, a SWOT analysis, and assumptions and constraints related to the project;
- Proposed business process maps, functional requirements, and technical requirements;
- Market trends, public sector trends, and solution options (custom development, framework, or commercial-off-the-shelf [COTS]); and
- Recommendations for an approach and implementation timeline, methodology, and proposed solution.

This recommendation methodology was structured considering the following four elements:

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- Alignment to goals and objectives;
- Cost comparison;
- Benefits comparison; and
- Risk analysis and mitigation.

Based on the CIRTS Market Analysis, the recommendation was for the State to replace CIRTS with a commercial off-the-shelf (COTS) solution or framework solution but keep an open mind and let the market offer solutions that would provide the best value to DOEA, its stakeholders, and client population.

In 2016, the Department received funding authority to begin activities for replacing CIRTS and established the eCIRTS Project. DOEA obtained matching funds authority from CMS for the eCIRTS Project in 2017. The eCIRTS Project is organized into several parts or phases, which are listed below:

- **Phase I (Pre-DDI)**
 - *Business Process Reengineering*
 - *Requirements Definition*
 - *Market Analysis/Business Case Development*

- **Phase II (Pre-DDI Activities)**
 - *Schedule IV-B Activities Development*
 - *Advance Planning Document Development*
 - *Use Cases Development*
 - *Invitation to Negotiate Development*
 - *Organizational Change Management and Workforce Transition (OCM/WFT) Plan Development*

- **Phase III (DDI Activities)**
 - *Full eCIRTS Implementation*
 - *Project Management Office (PMO) execution*
 - *OCM and WFT Execution (including training)*

- **Phase IV (Operations and Maintenance Activities)**
 - *Ongoing Maintenance*
 - *Enhancements*
 - *MMIS Certification by CMS*

Currently, the project is in pre-design, development, and implementation (pre-DDI) Phase II. Since its inception, the project has been organized into multiple workstreams. The workstreams for Pre-DDI are listed below.

Project Management Office (PMO) Workstream

The PMO Workstream is responsible for developing and executing project management strategies and for the procurement activities to acquire the new eCIRTS Solution and associated implementation and support services. The components of the PMO Workstream are defined below:

- **PMO Workstream:**
 - *Project Artifacts Development (Project Charter, Project Schedule, PMP, RAIDL Log);*
 - *PMO Support and reporting;*
 - *Schedule IV-B Development;*
 - *Implementation Advance Planning Document Development;*
 - *Invitation to Negotiate (ITN) Development and Support;*
 - *Benefits realization development, support and reporting;*
 - *Procurement Management Support; and*
 - *MMIS Certification Support.*

- **Business Process Standardization (BPS) Workstream:** Responsible for developing and executing business process standardization activities and creating functional business requirements for the Client Management Solution. The BPS Workstream activities include the following:
 - *Business Process Reengineering Development;*
 - *Requirements Traceability Matrix Development; and*
 - *Use Case Definition Development.*

- **OCM/WFT Workstream:** Responsible for facilitating workgroups, surveying attendees, and assisting the project with maintaining regular and consistent communications with stakeholders. The OCM/WFT Workstream activities include the following:
 - *Organizational Change Management Plan Development and Implementation;*
 - *Workforce Transition Plan Development and Implementation;*
 - *Communications Plan Development and Implementation; and*
 - *Training Development and Support.*

1.3 ITN Objective and Solution Goals

1.3.1 ITN Objective

The objective of this ITN is to acquire a Client Management Solution and a highly capable system integrator that best meet the needs of the DOEA and the State. The procurement process is designed to achieve a best-value acquisition of software capable of meeting the business requirements and integration services from an integrator with a proven record of successfully implementing similar solutions. The Department desires to make a bundled award for both software and system integration services to a single primary Respondent, although the primary Respondent may propose a third party's software and may propose to subcontract certain aspects of the integration and support services. One of the most important questions being explored in this ITN is how the proposed solution and Contractor can best meet the Department's needs. More specific questions can be found in sections 4.2.3.1.2 – 4.2.3.4. The facts being sought in this ITN are identified in Attachments D and E.

1.3.2 Solution Vision and Goals

The following describes the project vision statement and related solution goals. There will be checkpoints during the project to validate the solution's alignment with these goals.

Vision Statement

Implement an enterprise client management system that enhances staff efficiency, enables easy client access to services, and positions DOEA to plan for and be responsive to changing environmental and operational demands.

Solution Goals:

The following exhibits describe each of the six identified solution goals:

Goal 1: Enable standardization and automation of business processes within and between the Department and partner organizations

Goal Description

- Optimize current business processes;
- Provide standardization (entry screens, forms, data, etc.) and efficiency across entities; and
- Enhance functionality and ease of use.

Goal Business Value

- Reduces operational complexity and increases productivity through reduction of manual processes; and
- Establishes overall project and operational governance model to allow focus on process and data standardization.

Goal 2: Enhance overall program and system effectiveness with applicable technology tools

Goal Description

- Eliminate or reduce manual tasks for staff;
- Provide automated workflow capabilities, increasing staff efficiency, intra/interdepartmental collaboration, and customer response;
- Provide a consolidated, easier to manage central client record;
- Provide robust mobile capabilities, including assessments and quality assurance, via wi-fi, cellular, or offline;
- Utilize a modular approach to create a framework that is aligned with Medicaid Information Technology Architecture (MITA) Version 3.0;
- Implement a Service-Oriented Architecture (SOA) and unified data governance to provide Medicaid Management Information System (MMIS) compliance and more efficient customer service; and
- Achieve compliance the CMS Standards and Conditions for Medicaid IT.

Goal Business Value

- Transforms the workforce to better use and leverage new and available technology;
- Eliminates or minimizes manual processes increasing staff collaboration and efficiency by leveraging workflow and electronic document storage;
- Reduces time spent managing all client-related information, documentation, and contacts;
- Automates scheduling and provides route mapping optimization to create efficiencies, accuracy, and time optimization for clients and staff; and
- Provides information management tools to assist in effectively and efficiently managing DOEA's role in the state Medicaid program.

Goal 3: Increase data integrity, standardization, and security toward improved accuracy, operational efficiency, monitoring, reporting, and analytics by capturing a consistent and expandable set of data

Goal Description

- Support enterprise-wide and Department-specific reporting needs;
- Provide improved data reporting, data analytics, and business intelligence capabilities;
- Provide enhanced workforce oversight and strategic planning capabilities;
- Support enterprise master data strategies reducing duplicative data and improved data capture, accuracy, security and integrity; and
- Support interface standards and protocols.

Goal Business Value

- Supports paperless processing;
- Improves flexibility, timeliness, and integration of all data transactions;
- Provides more timely, consistent, and accurate information to aid operational decision-making;
- Provides supervisors the ability to assign tasks and monitor staff queues;
- Provides management the ability to access performance/productivity dashboards and strategic analytics;
- Standardizes data capture and reduces data duplication;
- Improves data accuracy, integrity, and security;
- Reduces complexity of integration by leveraging a more flexible and adaptable technology framework and platform; and
- Promotes the use of industry standards for information exchange and interoperability.

Goal 4: Improve collaboration and communication to optimize DOEA standard business processes

Goal Description

- Improve and expand client self-service capabilities by providing a web portal for clients and their caregivers to display the client's waitlist status and search for available community-based services;
- Provide staff with easy to use work queue dashboards; and
- Consolidate central client records for standardizing management of all client-related information.

Goal Business Value

- Provides more efficient and timely communication with clients regarding their requests for services;
- Allows for proactive notifications of assigned work; and
- Provides workers with a more robust, unified client record that increases accuracy and reduces redundant data and data entry errors.

Goal 5: Improve system flexibility, scalability, reliability, and cost of ownership

Goal Description

- Improve system performance, extensibility, and scalability by employing technology capable of evolving and growing as business needs and demands change;
- Reduce operations and maintenance responsibilities;
- Replace outdated hardware and software technologies with widely embraced current technology; and
- Implement a modular, flexible approach to systems integration, including the use of open interfaces and exposed application programming interfaces (APIs), and separation of business rules from core programming.

Goal Business Value

- Supports future implementation of vendor-supplied upgrades for functional and technical improvements due to the number of customizations being minimized;
- Leverages a modular architecture to improve the efficiency and effectiveness of system upgrades, reduce costs, improve system interoperability, and increase adherence to MITA and the Standards and Conditions for Medicaid IT;
- Increases system security, stability, reliability, and recoverability with latest technology standards; and
- Improves flexibility, timeliness, and integration of all data transaction processing.

1.4 Mandatory Minimum Qualifications

A Respondent must meet all the Department's Mandatory Minimum Qualifications identified in the following qualification questions to be considered for award. Respondents will certify its adherence to the Mandatory Minimum Qualifications as part of their Technical Reply within the Transmittal Letter. The Department will not evaluate Replies from Respondents that answer no to any of the qualification questions:

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- a) Does the Respondent confirm it is registered with the Florida Department of State, Division of Corporations (Sunbiz.org), to transact business in the State, or does the Respondent certify that if awarded a contract under this ITN, it will register with the Florida Department of State prior to execution of the contract, or does the Respondent certify that it is not required to register with the Florida Department of State (see applicable sections of the Title XXXVI, Business Organizations, Chapters 605 through 623, F.S.)?
- b) Does the Respondent certify the person submitting the Reply is authorized to respond to this ITN on Respondent's behalf?
- c) Is the Respondent committed to entering a negotiated contract based on this ITN and the Respondent's reply, including any Best and Final Offers (BAFOs) or Interim Revised Replies (IRRs)?
- d) Does the Respondent certify it, and any proposed subcontractors, is not a Convicted Vendor or Discriminatory Vendor, as defined in Sections 7 and 8 of General Instructions to Respondents (PUR 1001)?
- e) Does the Respondent certify compliance with Section 9 of PUR 1001, Respondent's Representation and Authorization?
- f) Does Respondent certify it and any proposed subcontractors are not 1) on the Scrutinized Companies with Activities in Sudan List, 2) on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or 3) participating in a boycott of Israel (see section 287.135, F.S.)?
- g) Does the Respondent and any proposed subcontractors meet the requirements for having no known conflicts of interest as outlined in Section 6 of PUR 1001, Conflict of Interest?
- h) Does the Respondent agree all State data that is confidential information, which is generated, used, or stored by Respondent pursuant to the prospective contract will reside and remain in the United States and will not be transferred out of the United States? Will the Respondent include language in any subcontractor agreements that data generated, used, or stored by the subcontractor pursuant to the prospective contract will reside and remain in the United States and will not be transferred out of the United States?
- i) Has the Respondent completed, as the primary provider of integrator services, at least two implementations of the proposed Client Management Software Product that is currently in production as the client management system for a public sector entity?
- j) Did the Respondent submit a responsive reply consisting of Technical Reply, Cost Reply, and Replies to Business Requirements using the Requirements Traceability Verification Matrix tool?
- k) Did the Respondent submit a Cost Reply in accordance with ITN Section 3.4 – How to Submit a Reply and Attachment C – Cost Reply Instructions and Workbook?

- l) Did the Respondent submit an opinion of out-of-state Respondent's attorney on bidding preferences, if applicable per Section 3.4.4.2 - Principal Place of Business and Foreign State Preferences in Contracting?

The Respondent acknowledges the Department will rely on the representations made in the Respondent's Reply to these Mandatory Minimum Qualifications in making its decisions of award. If the Department discovers that any information provided is false prior to the award of the Contract, the Department may determine the Respondent nonresponsive.

1.5 Term

The Department is contemplating a multi-year, fixed-price, deliverable-based contract with an initial term and renewal periods in accordance with Florida law and subject to appropriations. The contract term will be determined during negotiations.

1.6 Definitions

In addition to the definitions in PUR 1000 – General Contract Conditions (PUR 1000) and PUR 1001 – General Instructions to Respondents (PUR 1001) – the definitions that apply to this ITN are described in Attachment H - Definitions.

1.7 Special Accommodations

Any person requiring a special accommodation due to a disability should contact the Department's Purchasing Agent. Requests for special accommodation for meetings must be made at least five business days prior to any meeting included in Section 2.2 - Timeline of Events.

1.8 Contact Person

The Purchasing Agent is the sole point of contact from the date of this ITN's release until award. All procedural questions and requests for clarification of this ITN must be submitted in writing to the Purchasing Agent:

Justin Taylor, Purchasing Director
Email address: taylorj@elderaffairs.org

*****INCLUDE THE ITN NUMBER IN ALL EMAILS TO THE
PURCHASING AGENT IN THE SUBJECT LINE OF THE EMAIL*****

The Department's Procurement Office address is:

Department of Elder Affairs
Contract Administration and Purchasing
4040 Esplanade Way
Tallahassee, FL 32399

Respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the 72-hour period following the agency posting the notice of intended award, excluding Saturdays, Sundays, and state holidays, any employee or officer of the executive or legislative branch concerning any aspect of this solicitation, except in writing to the

procurement officer or as provided in the solicitation documents. Violation of this provision may be grounds for rejecting a response.

Please note that questions will **NOT** be answered via telephone. Responses to questions posed to the Purchasing Agent in writing before the deadline to submit questions as identified in Section 2.2 - Timeline of Events will be posted on the Vendor Bid System (VBS) website at http://myflorida.com/apps/vbs/vbs_main_menu (modifies Section 5 of PUR 1001).

Only communications which are in writing from the Department may be considered as authorized communications on behalf of the Department. The Respondent will not engage in any lobbying efforts or other attempts to influence the Department or the evaluation or negotiation team to be selected.

1.9 State Medicaid Agency Project Officer

The Project Officer for AHCA, the State Medicaid Agency for Florida, providing oversight for this project is:

Terri Fuller, PMP
Florida Agency for Health Care Administration
Medicaid Enterprise Systems (MES) Procurement, Fiscal Agent Operations
2727 Mahan Drive
Tallahassee, FL 32308
Terresa.Fuller@ahca.myflorida.com
850-412-3457

1.10 ITN Support Services

The following list of organizations participated in the Market Analysis and the drafting of this ITN:

- Strategic IT Alignment Group, LLC

Contract/Purchase order information for this contracted support service provider can be found on the Vendor Bid System website listed in ITN Section 1.10 below.

Section 287.057(17)(c), F.S., states in part:

“[a] person who receives a contract that has not been procured pursuant to subsections (1)-(3) to perform a feasibility study of the potential implementation of a subsequent contract, who participates in the drafting of a Solicitation or who develops a program for future implementation, is not eligible to contract with the agency for any other contracts dealing with that specific subject matter, and any firm in which such person has any interest is not eligible to receive such contract.”

1.11 Supporting Information

The files/documents at the following links contain supporting information for this ITN: The following publicly available information may be helpful to the Respondents in developing their reply. Respondents should monitor any sources they are using for updates during the procurement process which may affect their response.

- American’s with Disabilities Act
<http://www.ada.gov/>

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- Enhanced Funding Requirements: Seven Conditions and Standards
<http://www.cms.gov/Medicaid-Information-Technology-MIT>
- Florida Administrative Code and Florida Administrative Register website for Florida Information Technology Project Management and Oversight Standards (Chapter 74-1, Florida Administrative Code)
<https://www.flrules.org/gateway/ChapterHome.asp?Chapter=74-1>
- HIPAA Administrative Simplification
<http://www.cms.gov/Regulations-and-Guidance/HIPAA-Administrative-Simplification/HIPAAGenInfo/index.html>
- MITA Medicaid Information Technology Architecture (MITA)
<http://www.medicaid.gov/medicaid-chip-program-information/by-topics/data-and-systems/medicaid-information-technology-architecture-mita.html>
- MITA 3.0
<https://www.medicaid.gov/medicaid/data-and-systems/mita/mita-30/index.html>
- MyFloridaMarketPlace (MFMP) Procurement System's Vendor Information Portal
<https://vendor.myfloridamarketplace.com/>
- Older Americans Act
https://www.ssa.gov/OP_Home/comp2/F089-073.html
- Pre-DDI Project Management Plan
http://elderaffairs.state.fl.us/doea/eCIRTS/eCIRTS_Project_Management_Plan_Phase_II.pdf
- Project Charter
http://elderaffairs.state.fl.us/doea/eCIRTS/eCIRTS_Project_Charter.pdf
- Privacy and Security Standards – NIST Special Publications
<http://csrc.nist.gov/publications/PubsSPs.html>
- Project's Current Organizational Chart
http://elderaffairs.state.fl.us/doea/eCIRTS/Project_Team_Visio.pdf
- PUR 1000 and PUR 1001
http://dms.myflorida.com/business_operations/state_purchasing/documents_forms_references_resources/purchasing_forms
- CIRTS Business Process Reengineering
http://elderaffairs.state.fl.us/doea/eCIRTS/eCIRTS_Business_Process_and_Definition_Document.pdf
- CIRTS Requirements Traceability Matrix
http://elderaffairs.state.fl.us/doea/eCIRTS/Requirements_Traceability_Matrix.xlsm

- Scrutinized List of Prohibited Companies
<https://www.sbafla.com/fsb/FundsWeManage/FRSPensionPlan/GlobalGovernanceMandates.aspx>.
- U.S. Digital Services Playbook
<https://playbook.cio.gov>
- Vendor Bid System (VBS)
http://myflorida.com/apps/vbs/vbs_www.main_menu
- Vendor Payment Information Regarding Rule 60A-1.030-.032, F.A.C.
<http://www.myfloridacfo.com/Division/AA/Vendors/default.htm>

Any questions related to links in this ITN document must be directed to the Purchasing Agent in Section 1.8 – Contact Person.

SECTION 2 ITN PROCESS

2.1 General Overview of the ITN Process

The ITN is a method of competitively soliciting a commodity or contractual service under Chapter 287, F.S. The Department will post the ITN and any addenda on the VBS. Reference materials and related reply-formatted documents are located on the DOEA website. The process will include a written question and answer period, submission of Replies followed by reviews to identify responsive and responsible Replies, a review of Mandatory Minimum Qualifications, evaluation, negotiation, and award. The process may include a mandatory pre-bid meeting.

Respondents may submit formal questions in writing to the Purchasing Agent by the date listed in Section 2.2 - Timeline of Events, using the question format table provided in ITN Section 3.4.1. If there are any perceived inconsistencies among any of the provisions of the ITN and its attachments, Respondents are expected to bring these inconsistencies to the attention of the Department's Purchasing Agent before the deadline to submit questions as identified in Section 2.2 - Timeline of Events. Respondents must not submit Replies before the answers to Respondents questions are posted on VBS or the eCIRTS Project web page. Submission earlier than 10 calendar days before the Replies are due is not recommended since the Department may post addenda to the ITN. Replies must be submitted by the deadline listed in the Section 2.2 - Timeline of Events. The Department will open the Replies in a public meeting.

Section 1.4 describes the Mandatory Minimum Qualifications to be considered responsive. If a Reply contains language which withdraws or negates commitments to requirements of the ITN, such as a Technical Reply or Cost Reply that states the Reply is for evaluation purposes only and should not be interpreted as a binding offer or commitment on the part of a Respondent, or qualifies the Reply such that it is not a binding offer to contract under terms consistent with the requirements of this ITN, the submission may be deemed nonresponsive and rejected. Replies that fail to submit all required information may also be deemed nonresponsive.

2.2 Timeline of Events

The timeline for this ITN is described in Attachment I – Timeline of Events.

2.3 Addenda to the ITN

The Department reserves the right to modify this ITN from time to time by issuing addenda. Addenda will be posted on VBS. It is the Respondent's responsibility to check VBS on a regular basis for any changes.

2.4 Contract Formation

The Department will enter into a Contract with the Respondent awarded pursuant to Section 4.3-Negotiation.

The SSI Contract is attached as Attachment G. This draft will be the basis for the awarded Contract, but terms and conditions of the Contract and its Attachments including, at a minimum, a Statement of Work will be negotiated during negotiations. The Department is not bound to enter into a contract with any Respondent unless the Respondent represents the best value to the State and the Department is able to negotiate the conditions and price that it considers fair, competitive, and reasonable.

2.5 Disclosure of Reply Contents

All documentation produced as part of a Reply to the ITN will become the property of the Department and will not be returned to the Respondent unless the Reply is withdrawn prior to the Reply Opening. Replies are subject to Section 119.071(1), F.S. Replies will be opened on the date and at the location indicated in Section 2.2 - Timeline of Events. Respondents may attend, but they are not required to do so. The Department will not announce proposed costs or release other materials pursuant to Section 119.071(1)(b), F.S.

The Department may use proposed costs and information related to proposed costs from the Replies to formulate appropriation request(s) related to the project at any time during this ITN.

2.6 Modify Reply

Respondents may modify a Reply at any time prior to the Reply deadline. If a Reply has already been submitted prior to the Reply deadline, the previously-submitted Reply must be withdrawn before a modified Reply is submitted.

2.7 Diversity

The Department is dedicated to fostering the continued development and economic growth of small, minority-, veteran-, and women-owned businesses. Participation of a diverse group of Respondents doing business with the State is central to the Department. To this end, small, minority-, veteran-, and women-owned business enterprises are encouraged to participate in the Department's procurement process as both prime Respondents and subcontractors.

2.8 Certain Meetings Not Open to Public

Any portion of a meeting at which a negotiation with a vendor is conducted pursuant to a competitive solicitation, at which a vendor makes an oral presentation as part of a competitive solicitation, or at which a vendor answers questions as part of a competitive solicitation is exempt from public meeting requirements per Section 286.0113(2)(b)1., F.S. Meetings at which negotiation strategies are discussed are exempted by Section 286.0113(2)(b)2., F.S. The Department will record all meetings of the negotiation team, as required by law, and such recordings, except to the extent identified as

exempt or confidential and exempt, will eventually become a public record. During negotiations, a Respondent must inform the Department if any portion of the meetings should be considered exempt or confidential and exempt because of discussions of trade secrets or other Confidential Information so that the Department can make appropriate arrangements for the segregation of the recording.

SECTION 3 REPLY INSTRUCTIONS

3.1 Purchasing Instructions and General Conditions

Respondents are cautioned and reminded to read carefully and to respond precisely and fully based on all information contained in PUR 1000 and PUR 1001. The requirements of this ITN, including the attachments, will be considered special conditions or special instructions for purposes of superseding the provisions of PUR 1000 and PUR 1001, in compliance with Rule 60A-1.002(7), Florida Administrative Code (F.A.C.).

PUR 1000 and PUR 1001 are incorporated herein and may be accessed at the hyperlink below:

http://dms.myflorida.com/business_operations/state_purchasing/documents_forms_references/resources/purchasing_forms.

3.2 MFMP Registration

Respondents must, by the time the contract is signed, have a current vendor registration and be active within the MyFloridaMarketPlace (MFMP) Procurement System's Vendor Information Portal at: <https://vendor.myfloridamarketplace.com/> with a company name that matches the company name with the Florida Department of State, Division of Corporations (<http://www.sunbiz.org>).

3.3 Who May Respond

Only a single prime Respondent is permitted to submit a Reply. However, that Respondent may utilize Subcontractors to perform some of the integrator services. A Respondent providing integration services can be a prime Respondent in one Reply and a Subcontractor in another Reply. Any Respondent team members that are also members of another Respondent's team shall not discuss the contents of any Reply or attend any presentations or negotiation session for more than one Respondent.

3.4 How to Submit a Reply

The Department is not liable for any cost incurred by a Respondent in responding to this ITN. The Respondent should examine carefully the contents of the ITN and be informed regarding all its requirements. The Respondent should prepare Replies simply and economically, providing a straightforward, concise delineation of the Respondent's capabilities to satisfy the requirements of this ITN. The Respondent should place emphasis within its Reply on completeness and clarity of content. The Respondent must consider Attachment G – SSI Contract as baseline terms for submitting its Reply. Section 2.4 – Contract Formation indicates the Contract terms and conditions will be negotiated during negotiations; however, Respondents shall not provide a redlined version of Attachment G – SSI Contract as part of their Reply.

A single Reply may only contain one client management software product. If a Respondent desires to propose more than one client management software product/solution, a separate complete Reply must be prepared and submitted for each client software/solution product, which will be scored separately. Within a single Reply, the Respondent must clearly articulate the software and Services the Respondent is proposing to implement the proposed Solution. A Respondent can recommend alternatives in Tab 11 of its Reply per the instructions in Attachment D – Technical Reply Instructions, Attachment C – Cost Reply Instructions and within the Scope of this ITN.

The Respondent must notify the Department of any exceptions to the Attachment G - SSI Contract in its Reply. With each identified exception or issue, include an explanation of the issue. However, the

Cost Reply must assume the terms of General Contract Conditions (PUR 1000) and Attachment G - SSI Contract.

Respondents are responsible for submitting their Replies by the date and time specified in Section 2.2 – Timeline of Events, and per the instructions in Attachment D – Technical Reply Instructions, Attachment C – Cost Reply Instructions and Workbook:

- Technical and Cost Reply (sealed separately within the same Reply package) will be submitted in printed and electronic form to the Procurement Office.

Part 1 as described above must be received in the Procurement Office by the deadline listed in Section 2.2 – Timeline of Events.

Submit Part 1 Replies as follows.

1. For each item listed below include a printed and equivalent electronic version. See Section 3.5 – Redacted Submissions for information regarding redactions. These submission instructions replace the submission instructions in Section 3 of PUR 1001:
 - One (1) Original Technical Reply Binder;
 - One (1) Original Cost Reply Binder;
 - Thirteen (13) copies of the Technical Reply (where one of the 13 is the Redacted Technical Reply if applicable); and
 - Thirteen (13) copies of the Cost Reply (where one of the 13 is the Redacted Cost Reply if applicable)
2. The original Reply binders must contain the originals of any documents required to be signed as part of the Reply submission (e.g., the original signed transmittal letter). The copies must be a complete and exact duplicate of the original but may include photocopies of signed documents. Make all binders 8 ½ x 11. Include the following printed information on both the outside front cover and on the spine of each binder:
 - << Respondent's name in which the contract would be awarded>>
 - Reply regarding ITN # DOEA eCIRTS #18-ITN-001-JT
 - ORIGINAL/Copy #_/Redacted Copy, Binder __ of __
3. The electronic copies must contain searchable content that can be copied (i.e., not a copy protected CD or scanned files [except for scanned forms such as copies of insurance forms and other required documentation]). The electronic copy can be provided as a CD, DVD, or on a USB flash drive.

If a USB flash drive is provided, place the USB flash drive in an envelope and on the envelope include the following:

- << Respondent's name in which the contract would be awarded>>
 - REPLY REGARDING ITN # DOEA eCIRTS ITN #18-ITN-001-JT
 - Copy #_ of _
4. Do not contain in the Reply (including software license agreement) any provisions unless such provisions are expressly negated in the Reply, which:
 - 1) Are inconsistent with Florida law;
 - 2) Exclude, prohibit, or negate other contract documents;

- 3) Subject the State of Florida to the jurisdiction of another state; or
- 4) Provide that the State will indemnify the contractor or any other person or entity.

3.4.1 Written Questions Format

Submit written questions in Microsoft Excel to the Purchasing Agent, in accordance with Section 2.2, Timeline of Events using the format of the table below.

Company Name	Document or Attachment Name	Section Reference	Question

3.4.2 Conceptual Modular Development Model

The Contractor(s) are encouraged to submit proposals offering a best in class solution and approach under direct accountability for all state for all phases. All proposed solutions will be comprised of proven, advanced technologies coupled with exceptional professional services to support the state’s key objectives and transformation goals. All contractors are encouraged to submit proposals demonstrating the following:

- An evolution to the MITA framework (technology architecture (TA), information architecture (IA), and business architecture (BA));
- Fulfillment of all the proposed solution(s) requirements outlined in this ITN (in part or whole);
- Compliance with all applicable state and federal laws, rules, regulations, guidelines, policies and procedures;
- The ability to adapt to change and respond to changes in the health care and social services industries;
- The ability to learn and adapt to new challenges and paradigms and provide utilities or services that integrate with health care on an enterprise wide level; and
- A verifiable record of accomplishment of successful, similar implementations of proposed solutions within a defined timeframe.

3.4.3 Technical Reply

Submit the Technical Reply (Part 1) in accordance with the instructions in ITN Attachment D – Technical Reply Instructions.

3.4.4 Cost Reply

The Cost Reply of Part 1 must be submitted in accordance with the instructions in ITN Attachment C – Cost Reply Instructions and Workbook.

3.4.5 Preferences

3.4.4.1 Award Preferences for Identical Evaluations of Replies

If the Department’s evaluation results in identical evaluations of Replies, the Department will provide and request the affected Respondents to submit an Award Preferences for Identical Evaluations of Reply form. The Department will apply the preferences consistent with Florida Statutes and Rule 60A-1.011, F.A.C.

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3.4.4.2 Preference to Florida businesses

The written attorney opinion referenced in Section 287.084(2), F.S., is required if the Respondent's Principal Place of Business is outside this State. The written opinion of an attorney at law licensed to practice law in that foreign state must state whether preferences, if any or none, are granted by the law of that state to its own business entities whose Principal Place of Business are in that foreign state in the letting of any or all public contracts. For this ITN, the preference in Section 287.084(1), F.S., will be applied if applicable. Principal Place of Business means the state in which the Respondent's high-level officers direct, control, and coordinate the Respondent's activities.

3.5 Redacted Submissions

- (a) For purposes of the Contract, the Contractor is responsible for knowing Florida's Public Records law, consisting of Chapter 119, F.S., Section 24(a) of Article I of the Florida Constitution, or other applicable State or federal law (Public Records Law).
- (b) All requests to inspect or copy Public Records made to the Contractor relating to the Contract must be sent directly to the Department. Notwithstanding any provisions to the contrary, disclosure of any records made or received by the State in conjunction with the Contract are governed by Public Records Law.
- (c) If the Contractor has a reasonable, legal basis to assert that any portion of any records submitted to the Department are confidential, proprietary, trade secret, or otherwise not subject to disclosure ("Confidential Information" or "Trade Secret") under Public Records Law or other authority, the Contractor must simultaneously provide the Department with a separate redacted copy of the records the Contractor claims as Confidential Information or Trade Secret and briefly describe in writing the grounds for claiming exemption from the Public Records Law, including the specific statutory citation for such exemption. This redacted copy of the records shall contain the Contract name and number and shall be clearly labeled "Confidential Information" or "Trade Secret." The redacted copy of the records should only redact those portions of the records that the Contractor claims are Confidential Information or Trade Secret. If the Contractor fails to submit a redacted copy of records it claims are Confidential Information or Trade Secret, such action may constitute a waiver of any claim of confidentiality.
- (d) The Department will respond to Public Records requests for records marked as "Trade Secret" pursuant to Section 624.4213, F.S., in accordance with the provisions specified in that statute. If the Department receives a Public Records request, and if records that have been marked as "Confidential Information" or "Trade Secret" are responsive to such request, the Department shall provide the Contractor-redacted copies to the requester. If a requester asserts a right to the portions of records claimed as Confidential Information or Trade Secret, the Department shall notify the Contractor that such an assertion has been made. It is the Contractor's responsibility to assert that the portions of records in question are exempt from disclosure under Public Records Law or other authority. If the Department becomes subject to a demand for discovery or disclosure of the portions of records the Contractor claims

as Confidential Information or Trade Secret in a legal proceeding, the Department shall give the Contractor prompt notice of the demand, when possible, prior to releasing the portions of records the Contractor claims as Confidential Information or Trade Secret (unless disclosure is otherwise prohibited by applicable law). The Contractor shall be responsible for defending its determination that the redacted portions of its records are Confidential Information or Trade Secret. No right or remedy for damages against the Department arises from any disclosure made by the Department based on the Contractor's failure to promptly legally protect its claim of exemption and commence such protective actions within ten (10) days of receipt of such notice from the Department.

- (e) The Contractor shall ensure that exempt or confidential and exempt Public Records are not disclosed except as permitted by the Contract or by Public Records Law.

SECTION 4 SELECTION PROCESS

4.1 Review of Mandatory Minimum Qualifications

Replies must satisfy all Mandatory Minimum Qualifications identified in Section 1.4 - Mandatory Minimum Qualifications to proceed into the evaluation process. Replies failing to meet all of the Mandatory Minimum Qualifications will be deemed nonresponsive and will not be considered further in the evaluation process.

4.2 Evaluation

An evaluation team consisting of three or more members, appointed in writing by the Department, will evaluate the Replies that meet the Mandatory Minimum Qualifications. Evaluators will be provided with all Reply information except for the Cost Reply to support scoring. Each member will evaluate independently of the others. Respondents whose Replies meet the Mandatory Minimum Qualifications will be invited to provide demonstrations of proposed software and make team presentations. Representatives for each Respondent (including key proposed Respondent’s Project Team members) must plan to be available in person, without interruptions, for the entirety of the Respondent’s scheduled software demonstration and team presentation session(s) in Tallahassee, Florida. An agenda for those demonstrations and presentations will be provided by the Department. Any visuals or handouts provided by a Respondent during demonstrations and presentations will become part of the Respondent’s Reply to explain the Reply rather than modify the Reply. Scoring of Replies will occur after demonstrations of proposed software and team presentations.

The table below provides a listing of the evaluation category and the maximum score for each evaluation category that will be used to score each Respondent.

Evaluation Category	Reply Section	Maximum Score
1. Software	Functional Business Requirements	50
	Technical Business Requirements	50
	Software Functional Capabilities	100
	Software Customization	100
	Software Technical Capabilities	100
	Maximum Score - Software	400
2. Implementation Services	<i>Project Management Services</i> <ul style="list-style-type: none"> • Project Management, Governance, and Oversight • Project Schedule and Work Breakdown Structure 	70
	<i>Application Services</i> <ul style="list-style-type: none"> • Project Approach, Methodology, and Phasing • Solution Analysis and Design • Application Configuration, Development, and Maintenance • Interfaces and Integration • Data Conversion and Data Migration • Data Architecture • Testing 	120
Evaluation Category	Reply Section	Maximum Score

	<ul style="list-style-type: none"> • Deployment and Post-Implementation Support • Implementation Road Maps 	
	<i>Technical Services</i> <ul style="list-style-type: none"> • Technical Architecture • System Infrastructure • Security and Technical Compliance 	80
	<i>Organizational Change Management Services</i> <ul style="list-style-type: none"> • Organizational Readiness and Communication • Knowledge Transfer • End User Training • eCIRTS Help Desk 	80
	Maximum Score – Services	350
3. Qualifications	Respondent References	25
	Prior Relevant Experience	125
	Maximum Score – Qualifications	150
4. Cost	<i>Calculated</i>	100
	Maximum Score – Cost	100
	TOTAL SCORE AVAILABLE	1,000

Respondent information provided in the following tabs (or portions of tabs) will not be assigned points during evaluation and will be used during negotiations as part of the best value determination.

- Tab 1 – Executive Summary
- Tab 2 – Primary Respondent Profile
- Tab 3 – Subcontractor Company Profile(s)
- Tab 5 – Project Facilities and Office Equipment
- Transition Section of Tab 9
- Tab 11 – Alternative Services
- Tab 12 – SSI Contract Exceptions

4.2.1 Financial Review

The Department will perform a review to determine the integrity and reliability of the Respondents. The Department may use subject matter experts during this review. The review, at a minimum, will include:

- Confirmation that the Respondent’s financial statements, as described by Attachment D - Technical Reply Instructions, Section 1.6, appear to reflect a financially stable firm, which is described further below.
- Confirmation that the Respondent is responsible based on a review of the information provided in Tab 2 and Tab 3 as referenced in Attachment D - Technical Reply Instructions.

The information provided in Tabs 2 and 3 as referenced in Attachment D - Technical Reply Instructions will be reviewed by a representative of DOEA’s Division of Financial and Support Services. The review of financial statements at a minimum includes a review of an Auditor’s Report, Balance Sheet, Income Statement, Statement of Cash Flows, and Notes to the Financial Statements. The financial status or any information provided in Tabs 2 and 3 as referenced in Attachment D - Technical Reply Instructions may be a basis for rejection of a Reply if the Department determines that such a circumstance poses any risk that the Respondent may be compromised in its ability to Software and System Integrator Services

perform the Services sought in the ITN, or would tend to undermine the public trust, or would cause a lack of confidence in the propriety of the Respondent, or would otherwise result in a perceived detriment to the State.

The Department may request, and the Respondent must provide, supporting information or documentation. Failure to supply supporting information or documentation as required and requested may be deemed nonresponsive.

4.2.2 Evaluator Scoring Guidelines

Evaluation team members will assign 0 – 5 points to each evaluation question, as applicable in ITN Section 4.2.3, using **no fractions or decimals**. The table below provides the scoring guidelines to be used by evaluation team members when assigning the 0 – 5 points to each question. Each item in the Assessment Description must be met in order to receive the score.

Assessment	Description	Evaluator Score
Excellent	<ul style="list-style-type: none"> • Reply fully meets all specifications and offers innovative solutions to meet specifications • Reply exceeds minimum specifications and provisions in most aspects for the specific items 	5
Good	<ul style="list-style-type: none"> • Reply more than adequately meets the minimum specifications or provisions of the specific items and exceeds those specifications in some respects for the specific items 	4
Adequate	<ul style="list-style-type: none"> • Reply adequately meets the minimum specifications, or provisions of the specific items and is generally capable of meeting the Department’s needs for specific items 	3
Marginal	<ul style="list-style-type: none"> • Reply minimally addresses the specifications, one or more major considerations of the component are not addressed, or is so limited that it results in a low degree of confidence in the Respondent’s Reply or proposed solution • Reply meets many of the basic specifications or provision of the specific items but is lacking in some essential aspects for the specific items 	2
Poor	<ul style="list-style-type: none"> • Reply fails to address the component or it does not describe any experience related to the component • Reply is inadequate in most basic specifications, or provisions for the specific items 	1
Information unacceptable	<ul style="list-style-type: none"> • Insufficient information provided to be evaluated 	0

The score for each Reply Section within an evaluation category (except for Sections related to the Requirements Traceability Verification Matrix Tool and Cost) will be calculated as follows with references to the column designations (A – E) in the example provided:

1. Evaluator’s score of 0 – 5 points for each question

2. Sum the points for each question within the Reply Section (A) and divide by the maximum points for that Reply Section (B) to generate the percentage of points earned for the Reply Section (C).
3. Multiply the percentage earned for the Reply Section (C) by the maximum points for the Reply Section (D) to obtain the number of points earned for the Reply Section (E).

Scoring Example

Following is an example of how calculations will be performed.

Evaluation Category: Implementation Services

Reply Section: Project Management Services

Question #	(A) Evaluator's Score	(B) Total Points Available
1	2	5
2	3	5
3	5	5
4	4	5
5	5	5
<i>Total</i>	19	25

Percentage of Points Earned	76.00%	(C)
x Maximum Points for Section	<u>25</u>	(D)
Points Earned for Section	<u>19</u>	(E)

To calculate the evaluator’s score for each Technical Reply, sum the number of points earned for each Reply Section across Software, Implementation Services, and Qualifications evaluation categories. To calculate the Respondent’s total score, average the number of points assigned for the Software, Implementation Services, and Qualifications evaluation categories across all evaluators and then add the scores for functional Business Requirements, technical Business Requirements, Respondent References, and Cost.

4.2.3 Evaluation Details

4.2.3.1 Software (0-400 Points)

The software category score is a combination of raw scores from the Requirements Traceability Verification Matrix tool and points assigned by evaluators. The Requirements Traceability Verification Matrix tool will provide detailed and summary reports to the Department that contain scores for functional and technical Business Requirements based on the Respondent’s input into the Requirements Traceability Verification Matrix tool. For additional information on the Requirements Traceability Verification Matrix Tool, see Attachment E – Requirements Traceability Verification Matrix Tool Instructions.

4.2.3.1.1 Requirements Traceability Verification Matrix Tool Replies to Business Requirements (0-100 Points)

The score for Requirements Traceability Verification Matrix tool Replies will be calculated by generating a percentage score for each Respondent based on each Respondent’s Reply in the Requirements Traceability Verification Matrix tool for both functional Business Requirements and technical Business Requirements and multiplying each Respondent’s percentage score times the maximum score allotted for those Business Requirements (up to 50 points for functional Business Requirements and up to 50 points for technical Business Requirements) to calculate each respective Respondent’s Business Requirements score. A description of the calculation steps and an example follows.

The score for Business Requirements that will be generated by the Requirements Traceability Verification Matrix Tool will be based on three variables:

1. Requirement Priority - The following table lists the Department’s assigned priorities and their associated point values.

Priority	Definition	Priority Value
Priority 1	A requirement for functionality to replace CIRTSS or technology necessary to support the new standard business processes for eCIRTSS	4
Priority 2	A requirement for functionality to improve the business process from current CIRTSS functionality or enhance the supporting technology	3
Priority 3	A requirement for functionality or technology that will either increase the performance or value of eCIRTSS	1

2. Respondent’s Requirements Traceability Verification Matrix Tool Reply Regarding Fit for Business Requirements - The following table lists the Respondent’s Fit choices and their associated point values.

Software Fit	Point Value
Configuration Basic	10
Configuration Advanced	8
Software Fit	Point Value
Customization Low	4
Customization Medium	4
Customization High	4

- Requirement Category Weighting - The following table lists the Department's assigned category weightings. The weighting will not be visible in the Requirements Traceability Verification Matrix tool.

Business Requirements Category	Category Weighting
Functional	
Priority 1	73%
Priority 2	22%
Priority 3	5%
Functional Total %	100%
Technical	
Category Weighting	
Priority 1	94%
Priority 2	3%
Priority 3	3%
Technical Total %	100%

The Requirements Traceability Verification Matrix Tool Business Requirements scores will be calculated as follows with references to the column designations (A-G) in the example provided:

- For each individual Business Requirement, multiply the Requirements Traceability Verification Matrix Tool Business Requirement's Requirement Priority (A) times Respondent's Reply Regarding Fit for Requirements (B), which will equal Individual Requirement Points (C).
- Sum the Individual Requirement Points (C) for each Requirement Category (to get the Requirement Points for the Category).
- For each Business Requirements Category divide the sum of the Individual Requirement Points for the Category (C) by the Total Possible Requirement Points for the Category (D), which will equal the Category Raw Percentage Score (E).
- For each Requirement Category, multiply the Category Raw Percentage Score (E) times its respective Requirement Category Weighting (F), which will equal the Category Percentage Score (G).
- Sum the Category Percentage Score for each Category, which will equal the Overall Percentage Score.
- Multiply the Overall Percentage Score times the Maximum Score for Requirements Traceability Verification Matrix Tool Replies to Requirements, which will equal the Respondent's Requirements Score.

Scoring Example for Requirements Traceability Verification Matrix Tool Replies for Business Requirements

Following is an example of how calculations will be performed.

Column Designations [A] [B] [C] [D] [E] [F] [G]

Calculations		Assigned	Assigned per Reply	[A] x [B]	[A] x 10 max. pts.	[C] / [D]	Assigned	[E] x [F]
Functional Requirement Category	Requirement	Functional Requirement Priority	Respondent's Reply Regarding Fit for Functional Requirements	Individual Requirement Points	Total Possible Points	Category Raw % Score	Functional Requirement Category Weighting	Category Weighted % Score
Assessment	AS1	4	10	40	40			
Assessment	AS2	4	4	16	40			
Assessment	AS3	1	10	10	10			
Assessment	AS4	3	8	24	30			
Total for Assessment				90	120	75.00%	7.27%	5.45%
Case Management	CM1	4	8	32	40			
Case Management	CM2	3	4	12	30			
Case Management	CM3	1	10	10	10			
Case Management	CM4	4	8	32	40			
Total for Case Management				86	120	71.67%	8.18%	5.86%
Overall % Score								11.31%
Maximum Points for Requirements Traceability Verification Matrix Tool Responses to Functional Requirements								50
Functional Requirements Score (11.31% x 50 Points = 5.66 Points)								5.66

Technical Requirement Category	Requirement	Technical Requirement Priority	Respondent's Reply Regarding Fit for Technical Requirements	Individual Requirement Points	Total Possible Points	Category Raw % Score	Technical Requirement Category Weighting	Category Weighted % Score
Security	SE1	4	10	40	40			
Security	SE2	4	4	16	40			
Security	SE3	1	10	10	10			
Security	SE4	3	8	24	30			
Totals for Security				90	120	75.00%	16.70%	12.53%

Disaster Recovery	DR1	4	8	32	40			
Disaster Recovery	DR2	3	4	12	30			
Disaster Recovery	DR3	1	10	10	10			
Disaster Recovery	DR4	4	8	32	40			
Totals for Disaster Recovery				86	120	71.67%	8.90%	6.38%
Overall % Score								18.91%
Maximum Points for Requirements Traceability Verification Matrix Tool Responses to Technical Requirements								50
Technical Requirements Score (18.91% x 50 Points = 9.46 Points)								9.46

4.2.3.1.2 Software Functional Capabilities (0-100 Points)

Evaluators will assign points to evaluation questions considering the software demonstrations (including team presentations), the Technical Reply (See Attachment D - Technical Reply Instructions), and the Requirements Traceability Verification Matrix tool information using the following evaluation questions:

1. Did the Respondent propose an integrated Client Management Solution of software and software modules that meets the requested functional capabilities?
2. Has the Respondent proposed a licensing and maintenance approach that supports a staged approach?
3. Does the Respondent's proposed availability of the software functionality align with the product road map for the proposed Client Management Solution?
4. Is all the functionality provided as a part of the Primary Client Software Product, or are third party add-ons necessary to address the functional requirements?
5. Did the Respondent's proposed Solution demonstrate its knowledge of the State and clearly articulate how the solution will meet the needs of the State?
6. Are there any strategic advantages of the proposed software identified by the Respondent that would benefit the State?
7. Does the proposed solution appear easy to navigate and will it be intuitive to the end user?

4.2.3.1.3 Software Customizations (0-100 Points)

Evaluators will assign points to evaluation questions considering the software demonstrations (including team presentations), the Technical Reply (See Attachment D - Technical Reply Instructions), and the Requirements Traceability Verification Matrix tool information using the following evaluation questions:

1. Were the number of customizations limited to those necessary to meet the State's Business Requirements?
2. Did the Respondent propose any implementation considerations other than a software customization to meet the requirements?
3. Will the customizations be easy for the Department to maintain and have a minimal impact on the upgrade path of the software?

4. Do the required customizations constitute a minor portion of the overall software functionality?

4.2.3.1.4 Software Technical Capabilities (0-100 Points)

Evaluators will assign points to evaluation questions considering the software demonstrations (including team presentations), the Technical Reply (See Attachment D - Technical Reply Instructions), and the Requirements Traceability Verification Matrix tool information using the following evaluation questions:

1. Did the Respondent effectively communicate how the software and software modules integrate to create a Client Management Solution?
2. Does the Respondent's proposed approach to software patterns, frameworks, protocols, and tools for data management, including interoperability and integration meet the requested services?
3. Does the Respondent's proposed operating systems and platforms, the end-user client supported platforms and access mechanisms, and software development languages meet the requested services?
4. Do the Respondent's proposed tools to maintain the system including patch and management and deployment, as well as application instrumentation processes and tools including root cause analysis support the requested services?
5. Does the Respondent's proposed software security, access control, and technical compliance capabilities including audit tools and processes meet the requested services?

4.2.3.2 Implementation Services (0-350 Points)

Evaluators will assign points to evaluation questions considering the software demonstrations (including team presentations) and the Technical Reply using the following evaluation questions.

4.2.3.2.1 Project Management Services (0-70 Points)

1. Does the Respondent's approach to the Project Management Services meet the requested Services, add value (innovative, sustainable, practical, mitigates risks), and include appropriate detail for each phase?
2. Do the proposed Deliverables and Work Products provide the necessary documentation to support the proposed Project Management approach at an appropriate level of detail?
3. Are the Project Management responsibilities clear for both the Department and Contractor Staff? Is the separation of responsibilities clearly defined and does the distribution seem reasonable?
4. Did the Respondent effectively demonstrate an understanding of, and the ability to, perform the Project Management Services, including an understanding of the Agency for State Technology (AST) Project Management standards defined in Chapter 74-1, Florida Administrative Code?

5. Did the Respondent effectively describe an approach to quality management that is practical and will produce high quality results?
6. Did the Respondent clearly describe an effective and practicable approach to risk management?
7. Do the proposed Project Management tools support the proposed Project Management Services? Does the Respondent's proposed Project Management approach and tools have proven success with a project of similar complexity and scope?
8. Did the Respondent provide a logical and organized work breakdown structure? Did the Respondent provide a reasonable and achievable project schedule that aligns with the implementation approach?
9. Did the Respondent effectively describe how the project schedule will be managed throughout the implementation?

4.2.3.2.2 Application Services (0-120 Points)

1. Is the proposed implementation approach reasonable, clearly described, and based on the Respondent's evidence of previous success on a project of similar complexity and scope?
2. Does the proposed implementation and phasing approach minimize risk to the State?
3. Did the proposed implementation approach include appropriate detail for each phase?
4. Does the Respondent's approach to Application Services meet the requested services, add value (innovative, sustainable, practical, demonstrated), minimize implementation risk, and provide appropriate detail for each phase for these Application Services?
 - Solution Analysis and Design
 - Application Configuration and Development
 - Interfaces and Integration
 - Data Conversion and Data Migration
 - Data Architecture
 - Testing
 - Deployment and Post-Implementation Support
5. Do the proposed support tools support these Application Services?
 - Solution Analysis and Design
 - Application Configuration and Development
 - Interfaces and Integration
 - Data Conversion and Data Migration
 - Data Architecture
 - Testing
 - Deployment and Post-Implementation Support
6. Do the proposed Deliverables and Work Products provide the evidence (including enough content) to support these Application Services being performed at an appropriate level of detail?

- Solution Analysis and Design
 - Application Configuration and Development
 - Interfaces and Integration
 - Data Conversion and Data Migration
 - Data Architecture
 - Testing
 - Deployment and Post-Implementation Support
7. Are the implementation responsibilities clear for both the Department and Contractor Staff, is the separation of responsibilities clearly defined, and does the distribution seem reasonable for these Application Services?
- Solution Analysis and Design
 - Application Configuration and Development
 - Interfaces and Integration
 - Data Conversion and Data Migration
 - Data Architecture
 - Testing
 - Deployment and Post-Implementation Support
8. Did the Respondent effectively describe how the State’s proposed standardized business process models (which identify items such as accounting events, integration points, internal controls, and reports) will be used and incorporated throughout the project?
9. Did the Respondent effectively describe the role and level of involvement of users and other stakeholders during analysis and design?
10. Did the Respondent effectively describe the role and level of involvement of users and other stakeholders during configuration and development?
11. Did the Respondent effectively describe their development approach for forms, reports, interfaces, conversion and extensions, and workflow?
12. Did the Respondent effectively describe the ability to interface to systems operated by other agencies, the Agency for Health Care Administration’s Florida Medicaid Management Information System (FMMIS), and third-party entities using modern, services-based patterns and technologies?
13. Did the Respondent effectively demonstrate an understanding of the complexity of data conversion as it relates to migration activities, the implementation schedule, and Department waves?
14. Did the Respondent effectively demonstrate an understanding of the complexity of how the data architecture will accommodate and interact with the rest of the enterprise including FMMIS and other Department business systems?
15. Does the Respondent’s testing approach consider all types of requested testing services and are planned to occur within a reasonable timeframe so that the solution is prepared for user acceptance testing?

16. Did the Respondent effectively describe the role and level of involvement of users and stakeholders during testing?
17. Did the Respondent effectively demonstrate the key factors for determining wave deployment?
18. Did the Respondent clearly articulate how eCIRTS will become the system of record for client management and budget control?
19. Did the Respondent effectively demonstrate an understanding of the software update and defect resolution process throughout the project life cycle?
20. Did the Respondent clearly describe an effective and practical configuration and release management approach?
21. Did the Respondent effectively describe their approach to post-implementation support?
22. Did the Respondent effectively describe the approach for end user support during deployment and post implementation?
23. Did the Respondent specify how the proposed solution complies with applicable standards identified by the State, including best practices of the U.S. Digital Services Playbook (<https://playbook.cio.gov>), and how the compliance can be verified during the Design, Development, and Implementation (DDI) phase and maintained during the Operations and Maintenance phase?

4.2.3.2.3 Technical Services (0-80 Points)

1. Did the Respondent propose Client Management Solution hardware based on the deployment approach?
2. Does the Respondent's approach meet the requested services, add value (innovative, sustainable, practical, demonstrated), minimize implementation risk, and provide appropriate detail for each phase for these technical services?
 - Technical Architecture
 - System Infrastructure
 - Security and Technical Compliance
3. Do the proposed support tools support these technical services?
 - Technical Architecture
 - System Infrastructure
 - Security and Technical Compliance
4. Do the proposed deliverables and work products provide the evidence (including enough content) to support these technical services being performed at an appropriate level of detail?
 - Technical Architecture
 - System Infrastructure

- Security and Technical Compliance
5. Are the implementation responsibilities clear for both the Department and Contractor, is the separation of responsibilities clearly defined, and does the distribution seem reasonable for these technical services?
 - Technical Architecture
 - System Infrastructure
 - Security and Technical Compliance
 6. Did the Respondent effectively describe how the technical architecture will be realized for the implementation services?
 7. Did the Respondent propose system infrastructure to support the implementation of the proposed Client Management Solution?
 8. Does the system infrastructure align with the implementation services throughout the lifecycle of the project and the overall Technical Architecture Strategy?
 9. Did the Respondent effectively demonstrate an understanding of the technical architecture's relationship to the State's business processes?
 10. Did the Respondent effectively demonstrate an understanding of information technology controls?

4.2.3.2.4 Organizational Change Management Services (0-80 Points)

1. Does the Respondent's approach to the Organizational Change Management Services meet the requested services, add value (innovative, practical, mitigates risks, holistic), and provide appropriate detail for each phase for these Organization Change Management Services?
 - Organizational Readiness and Communication
 - Knowledge Transfer
 - Training
 - eCIRTS Help Desk
2. Do the proposed support tools support these Organizational Change Management Services?
 - Organizational Readiness and Communication
 - Knowledge Transfer
 - Training
 - eCIRTS Help Desk
3. Do the proposed Deliverables and Work Products provide the evidence (including enough content) to support these Organizational Change Management Services being performed at an appropriate level of detail?
 - Organizational Readiness and Communication
 - Knowledge Transfer
 - Training
 - eCIRTS Help Desk

4. Are the implementation responsibilities clear for both the Department and Contractor Staff, is the separation of responsibilities clearly defined, and does the distribution seem reasonable for these Organizational Change Management Services?
 - Organizational Readiness and Communication
 - Knowledge Transfer
 - Training
 - eCIRTS Help Desk
5. Did the Respondent identify key stakeholders and describe an approach to assessing and supporting stakeholders?
6. Did the Respondent effectively demonstrate an understanding of how to identify, assess, and support knowledge transfer to the Department's functional and technical support staff?
7. Did the Respondent effectively demonstrate an understanding of the training considerations for waved rollouts to agencies, including an adequate number of training resources, method(s) for training delivery, and evaluation of the training effectiveness?
8. Did the Respondent's approach incorporate the Department's existing help desk structure into the Respondent's deployment approach including resource timing, scalability, roles and responsibilities, and tools?

4.2.3.3 Qualifications (0-150 Points)

Qualifications include points from References and Prior Relevant Experience.

4.2.3.3.1 References (0-25 Points)

The Department will average the scores provided in Attachment F – Reference Form and allocate up to 25 points total.

4.2.3.3.2 Prior Relevant Experience (0-125 Points)

Evaluators will assign points to evaluation questions considering the software demonstrations (including team presentations) and Technical Reply, which includes resumes, using the following evaluation questions:

- Has proposed Respondent's Key Staff previously appear to have the experience, qualifications, training, and certifications (if applicable) to effectively perform the role for which they are proposed?
- Does the proposed Respondent non-key staff, including subcontractors, appear to have the experience, qualifications, training, and certifications (if applicable) to effectively perform the role for which they are proposed?
- Are the proposed Respondent's Key Staff dedicated and aligned to support the proposed implementation timeline?
- Did the Respondent dedicate sufficient number of staff to all implementation service areas to provide adequate support?

- Does the Department's recommended staffing plan align to support the expectations of the Department's proposed responsibilities? Does the Department's proposed staffing plan align with the implementation approach?

4.2.3.4 Cost (Up to 100 Points)

For purposes of evaluation, the Respondent must provide a total cost for all products and Services necessary to meet the Department's specifications in the ITN. Costs will be evaluated based on the *Present Value of the Total Fixed Price Cost* located in cell D3 of Attachment C – Cost Reply Instructions and Workbook (Worksheet 1 – Deliverables). The cost score will be calculated by the Purchasing Agent assigned to this ITN and each Cost Reply will be scored by use of the following formula for all Respondents:

$(\text{Lowest Cost of All Replies} \div \text{Cost of Reply Being Evaluated}) \times \text{Maximum Score for Cost Reply} = \text{Cost Reply Score}$

4.3 Negotiation

After evaluation, the Department will compile the final evaluation scores to determine the competitive range of Replies reasonably susceptible of award (Competitive Range). The Department may then select one or more Respondents within the Competitive Range with which to commence negotiations (concurrently or sequentially) or may reject all replies. The Department will establish a negotiation team to conduct the negotiations and make an award recommendation after determining which Respondent presents the best value based on the selection criteria as identified in Section 4.3.4 – Basis of Award and Final Selection.

Selected Respondent(s) will be invited to provide more detailed clarifications of their replies and to provide interactive presentations of the Replies as part of the negotiations with the Department. Any information that the Respondent provides during negotiations constitutes an Interim Revised Reply (IRR) and becomes part of the Respondent's Reply. Failure to provide requested information may result in rejection of the reply.

Based on the clarifications, presentations, and negotiations, the Department will either award the contract to the Respondent who provides the best value for the Department and the State or reject all replies. The Department may at any time during the negotiations eliminate a Respondent from further consideration or stop negotiations with a Respondent. Additionally, the Department reserves the right to conclude negotiations at any time and proceed to contract award.

The negotiation team may consider any information obtained during evaluation but is not bound by evaluation scoring. The negotiation team may reassess any of the evaluation determinations and may consider any additional information that comes to its attention during the negotiations.

The Department is not bound to enter into a contract with any Respondent unless the Respondent is determined to provide best value to the State and the Department is able to negotiate the conditions and cost that it considers fair, competitive, and reasonable. This ITN will not result in an exclusive license to provide the services or products described in this ITN or the resulting contract. The Department may, in compliance with applicable law, contract with other Respondents or vendors to provide the same or similar services.

Negotiations may include discussions of the terms, conditions, costs, Statement of Work, and related services to be provided by the Respondent. The negotiation team will not engage in scoring but will arrive at its recommendation by discussion during a public meeting.

Respondents may be provided an opportunity to recommend enhanced value alternatives and provide information and options during negotiations. The Department reserves the right to negotiate different terms and related price adjustments if the Department determines that such changes would provide the best value to the State. The negotiation team may address each proposed alternative during negotiations but is under no obligation to accept a proposed alternative. If the negotiation team determines that a proposed alternative is not acceptable and the Respondent fails to offer another alternative that is acceptable to the negotiation team, the Respondent may be eliminated from further consideration or the negotiation team may stop negotiation with that Respondent.

4.3.1 Negotiation Location and Attendance

The Department will schedule negotiation sessions and distribute instructions and/or agendas in advance of each negotiation session. The negotiation sessions will be conducted in Tallahassee, Florida (FL), unless otherwise approved by the Department. The Representatives for each Respondent (including a representative authorized to agree to Contract terms on behalf of the Respondent and key proposed project team members relevant to the topic being discussed) must plan to be available in person, without interruptions, for the entirety of the Respondent's scheduled negotiation session(s) in Tallahassee, Florida. The Department reserves the right to require attendance at negotiation sessions by particular representatives of the Respondent. The Respondent should plan to limit its negotiation team to six individuals.

4.3.2 Revised Replies and Best and Final Offers

During the negotiation, the Department may request clarifications and revisions to replies (including best and final offers and revised best and final offers) until it is satisfied that it has achieved the best value to the State.

4.3.3 Other Department Rights During Negotiations

The Department reserves the right at any time during the negotiation process to:

- Conduct reference checks and due diligence investigation of any Respondent, as the Department deems appropriate in its discretion;
- Schedule additional negotiation sessions with any or all responsive Respondents;
- Require any or all responsive Respondents to provide additional, revised, or final replies addressing specified topics;
- Require any or all responsive Respondents to provide a written best and final offer;
- Require any or all responsive Respondents to address Services, prices, or conditions offered by any other Respondent;
- Arrive at an agreement with any responsive Respondent, finalize principal contract terms with such Respondent, and terminate negotiations with any or all other Respondents, regardless of the status of or scheduled negotiations with such other Respondents;
- Decline to conduct further negotiations with any Respondent;
- Re-open negotiations with any Respondent;

- Take any additional administrative steps the Department deems necessary in determining the final award, including additional fact-finding, or negotiation where consistent with the terms of this ITN;
- Review and rely on relevant information contained in the replies; and
- Include subject matter experts or other interested persons in negotiations with vendors, vendor presentations, and meetings at which negotiation strategies are discussed.

4.3.4 Basis of Award and Final Selection

After negotiations are conducted, the Department intends to award a Contract to the responsible and responsive Respondent whose reply, or Best and Final Offer (BAFO) if applicable, is assessed as providing the best value to the State by using the selection process. Selection criteria will include the following at a minimum:

- Respondent’s articulation, innovation, and demonstrated ability of the proposed approach to meet the Department’s Solution goals and the requirements of this ITN;
- Experience and skills of Respondent’s proposed Staff relative to the proposed approach; and
- Respondent’s pricing and overall costs to the Department.

The Negotiation team may modify or add to this selection criteria provided that such changes are disclosed to Respondent(s) engaged in such negotiations. The Negotiation team members will not numerically score Respondent(s); the final decision of which Respondent will be recommended for award may be made based by a majority vote of the Negotiation team members. Responsiveness may be assessed at any point in the selection process.

The Department will consider the total cost of the Contract, including renewal years as submitted by the Respondent.

The Department reserves the right to accept or reject any and all offers, or separable portions thereof, and to waive any minor irregularity, technicality, or omission if the Department determines that doing so will serve the best interest of the State. The Department has the right to use any or all ideas or adaptations of the ideas presented in any Reply.

In submitting a Reply, a Respondent agrees to be bound to the terms of General Contract Conditions (PUR 1000) and to negotiate Attachment G – SSI Contract, in good faith. Respondents must assume those terms will apply to the final contract, but the Department reserves the right to negotiate different terms and related cost adjustments if the Department determines during negotiations that those different terms and related cost adjustments will provide the best value to the State. A Respondent will not be allowed during negotiations to claim that its Cost Reply assumed or was predicated on different contract terms more favorable to the Respondent – any such claims will be disregarded. Respondents whose past performance, current status, or Reply does not reflect the capability, integrity, or reliability to fully and in good faith perform the requirements of a contract may be rejected.

The Department will coordinate a contract for signature, substantially in the form attached as ITN Attachment G – SSI Contract, between the Department and the awarded Respondent, as soon as possible after the posting of the notice of award on the VBS website, <http://myflorida.com/apps/vbs/vbs www.main menu>.

SECTION 5 ADDITIONAL ITN TERMS

The requirements of this ITN, including Attachment G – SSI Contract, are considered special conditions or special instructions for purposes of superseding the provisions of PUR 1000 and PUR 1001 in compliance with Rule 60A-1.002(7), F.A.C.

5.1 Inapplicable Provisions of PUR Forms

The following provisions found in the PUR 1000 are not applicable to this ITN:

- Section 2. Purchase Orders, omit the first three sentences;
- Section 4. Price Changes Applicable only to Term Contracts is hereby amended to remove subsection (b), Best Pricing Offer, and (e), Equitable Adjustment;
- Section 20. Limitation of Liability;
- Section 27. Purchase Order Duration;
- Section 31. Dispute Resolution; and
- Section 43. Cooperative Purchasing

The following provisions in the PUR 1001 are not applicable to this ITN:

- Section 3. Electronic Submission of Replies
Submit Replies in accordance with Section 3.4 of this ITN.
- Section 5. Questions
Submit Questions in accordance with Section 2.1 of this ITN.

5.2 Cooperation with Agency Inspectors General

The Respondent or Contractor understands its duty, pursuant to subsection 20.055(5), F.S., to cooperate with the inspector general in any investigation, audit, inspection, review, or hearing. The Contractor must comply with this duty and verify that its subcontracts issued under this Contract, if any, impose this requirement, in writing, on its subcontractors.

SECTION 6 ATTACHMENTS

A – Overview of Current Program

B – Project Specifications

C – Cost Reply Instructions and Workbook

D – Technical Reply Instructions

E – Requirements Traceability Verification Matrix Tool Instructions

F – Reference Form

G – SSI Contract

H – Definitions

I – Timeline of Events