Attachment D – Technical Reply Instructions

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SECTION 1 TECHNICAL REPLY STRUCTURE

Follow the format of the Technical Reply as outlined below. Label all tabs appropriately; comply with the instructions referenced within this document including page limits as described below. Use the file name shown in the "Electronic Copy File Name" column below for the digital copies. Adherence to this format is necessary in order to support the efficient and effective evaluation of Replies. Page counts below reflect duplex printing (front and back = 2 pages). **Do not include pricing or cost information in the Technical Reply.** The content in Table D-1: Technical Reply Format is for the Technical Reply and not an example.

Table D-1: Technical Reply Format

Technical Reply Content	Maximum # of Pages	Electronic Copy File Name
Title Page	1	TR01-Title Page-Respondent name.docx
Transmittal Information	4	TR02-Transmittal Letter-Respondent name.docx
Software Vendor Letter(s)	2	TR03-Software Letter-Respondent name and Software.docx
Table of Contents	No max	TR04-TOC-Respondent name.docx
TAB 1 – Executive Summary	4	TR05-ExecSumm-Respondent name.docx
TAB 2 – Primary Respondent Profile	4	TR06-PrimaryProfile-Respondent name.docx
TAB 3 – Subcontractor Company Profile(s)	4 (per profile)	TR07-SubProfile-Respondent name.docx
TAB 4 – Client Management Solution Software	No max *(See tab for table limits)*	TR08-CM Solution-Respondent name.docx
TAB 5 – Technical Infrastructure	No max	TR09-Infrastructure-Respondent name.docx

Technical Reply Content	Maximum # of Pages	Electronic Copy File Name
TAB 6 – Respondent References	12	TR10-References-Respondent name.docx
TAB 7 – Project Approach, Methodology, and Phasing	30	TR11-Approach-Respondent name.docx
TAB 8 – Draft Statement of Work	10 per implementation service	TR12-SOW-Respondent name.docx
TAB 9 – Proposed Project Staff	No max Resumes (max 2 per person)	TR13-Staffing-Respondent name.docx and TR14-Staffing Plan-Respondent name.xlsx and TR15-Dept Staffing Plan-Respondent name.xlsx
TAB 10 – Alternative Services	No max	TR16-Solution-Alternatives-Respondent name.docx
TAB 11 – SSI Contract Exceptions	No max	TR17-Contract-Exceptions-Respondent name.docx
Appendix 1: Proposed License and Maintenance Agreements	No max	TR18-AP1-License-Maintenance-Respondent name.docx
Appendix 2: Implementation Road Maps	TBD	TR19-AP2-Road-Maps-Respondent name.vsdx
Appendix 3: Proposed Project Schedule and WBS	10	TR20-AP3A-Project Schedule-Respondent name.mpp TR21-AP3B-Project Schedule-Respondent name.pdf TR22-AP3C-Project WBS-Respondent name.pdf

Technical Reply Content	Maximum # of Pages	Electronic Copy File Name
Appendix 4: Product Roadmap	No max	TR23-AP4-Product Map-Respondent name.vsdx

Provide the following content for each of the sections of the Technical Reply as described below.

1.1 Title Page

- "TECHNICAL REPLY"
- ITN Title
- ITN Number
- Respondent's Name
- Respondent's Business Address
- Respondent's Telephone Number
- Contact for Respondent (contact throughout procurement process)
- Email Address of Primary Contact for Respondent
- Phone Number of Primary Contact for Respondent

1.2 Transmittal Information

Include a transmittal letter on the letterhead of the entity submitting the Reply addressed to the Department's Purchasing Agent (see ITN Section 1.8 – Contact Person, Purchasing Agency) dated and signed by an individual who has the authority to bind the Respondent.

Include the following in the transmittal letter:

- Identify the submitting organization;
- Identify the name, title, telephone number(s), and email address of the person who is participating in negotiations and is authorized to bind a contract on behalf of the organization;
- A list identifying all organizations proposed as Subcontractors or software providers;
- A statement certifying that the Respondent's Reply is made in conformance with the ITN;
- A statement that the Respondent will, if selected, use or provide the facilities and office equipment as described in Section 3 of Attachment B – Project Specifications;
- A statement certifying that access was requested to the Requirements Traceability Verification Matrix (RTVM), the RTVM workbook was downloaded, the Respondent read and understood the instructions in ITN Attachment E – DOEA eCIRTS RTVM Instructions, and replies to the State's Business Requirements were input into the RTVM prior to the deadline to submit Replies (per ITN Section 2.2 - Timeline of Events);
- A statement acknowledging that all individuals who will be involved in performance of the Contract must pass a background screening prior to performing any contract work;

- A statement certifying that all Replies submitted by the Respondent to the Department constitute binding offers;
- A statement committing the Respondent to participate in software demonstrations and team presentations in Tallahassee, Florida, if requested by the Department; and,
- A Yes/No reply to each of the Department's Mandatory Minimum Qualifications in ITN Section 1.4.

1.3 Software Vendor Letters

Include a letter signed by an individual authorized to legally bind each vendor of the software products forming Respondent's proposed Client Management Solution (including Respondent itself if Respondent is the software vendor) containing the following certifications:

- The vendor currently offers generally available maintenance and support services for the proposed software to, among other things, keep the software current with the operating environment in which it is designed to function and correct material defects in the software, and that the vendor will continue to offer such maintenance and support services for [vendor insert proposed number of years] from the submission date for Replies;

- The vendor agrees that Department representatives may contact the vendor directly to make inquiries concerning vendor's software;

- The vendor agrees that Florida law will govern the interpretation and enforcement of the license agreement (and any related agreements) governing the State's use of the vendor's software and that all claims and disputes arising under or concerning such agreements will be resolved exclusively in state or federal courts sitting in Leon County, Florida; and

- The vendor has read, understands, and affirms the representations being made by the Respondent with respect to the vendor's software in the replies submitted in Tab 4 of the Technical Reply and RTVM identifying the vendor's product with in the "Source" field.

1.4 Table of Contents for Technical Reply

Include a Table of Contents that clearly identifies the location of all content of the Technical Reply, including enclosures and appendices. Clearly and uniquely number each page of the Technical Reply.

1.5 Tab 1 – Executive Summary

Include an Executive Summary that provides an overview of the proposed Solution in such a way as to provide the Department with a broad understanding of the Reply, including project facilities being offered, proposed products and services, and how these proposed products and services address the provisions requested in the ITN.

Include in the Executive Summary the Respondent's planned implementation timeline showing the Respondent's proposed Phases, stages and associated Solution Deliverables, approach, and an explanation of how the staff proposed are best qualified to perform the services.

1.6 Tab 2 – Primary Respondent Profile

Include a detailed narrative description of Respondent's organization and background. Include the following in the narrative:

- Organization
  - Brief overview of business operations, with an emphasis on client management-related business in the public sector;
  - Date established;
  - Ownership (public, partnership, subsidiary, etc.);
  - Location of Respondent's principal place of business;
  - Office location(s) responsible for performance of proposed tasks;
  - Qualifications and demonstrated experience with projects of similar size, scope, and complexity (including the public sector) that enable it to meet the requirements of the ITN, including any unique capabilities relevant to this Project;
  - Description of Respondent's relevant partners (e.g., states, universities, industry groups) that could be leveraged for the Project to build in collaboration;
  - An opinion of out-of-state Respondent's attorney on bidding preferences; and,
  - Index, listing the confidential information or exempt portions of the Reply (not included in the page count)

- Background
  - Full disclosure of any potential conflict of interest (e.g., serving as a reseller of computer hardware, business relationships between the Respondent and any of the Department's employees who function or have responsibilities in the review or approval of the undertaking or carrying out of the Project);
  - Full disclosure as to whether, within the last 10 years, the Respondent has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details *(not included in the page count)*;
  - Full disclosure, to the extent the Respondent is aware, of any of the following that have occurred within the last 10 years: (a) criminal litigation, proceedings, or Securities Exchange Commission, public agencies, and law enforcement investigations involving the Respondent or any of its then-current officers or directors; or (b) civil litigation, arbitration or proceeding, to which the Respondent is a party, and which involves:
    - software systems development or systems integration projects and which either relates to an amount in excess of $1,000,000 or might reasonably be expected to adversely affect the viability or financial stability of Contractor or any Subcontractor hereunder; or
    - a claim or written allegation of fraud against Contractor or, to the extent Contractor is aware, any Subcontractor hereunder by a governmental or public entity arising out

of their business dealings with governmental or public entities *(not included in the page count)*.

- Statement the Respondent shall notify the Purchasing Agent within ten (10) Business Days following the date on which Respondent first became aware of any such litigation, investigation, arbitration or other proceeding (collectively, a "Proceeding"). Details of settlements which are prevented from disclosure by the terms of the settlement may be annotated as such, involving the Respondent during the ITN process for any of the following: a) criminal litigation, proceedings, or Securities Exchange Commission, public agencies, and law enforcement investigations involving the Respondent or any of its then-current officers or directors; or (b) civil litigation, arbitration or proceeding, to which the Respondent is a party, and which involves:

  - software systems development or systems integration projects and which either relates to an amount in excess of $1,000,000 or might reasonably be expected to adversely affect the viability or financial stability of Contractor or any Subcontractor hereunder; or

  - a claim or written allegation of fraud against Contractor or, to the extent Contractor is aware, any Subcontractor hereunder by a governmental or public entity arising out of their business dealings with governmental or public entities *(not included in the page count)*.

- Full disclosure of any public sector software systems development or systems integration contracts of Respondent that were terminated for cause or convenience in the past five years either by the Respondent (or its Subcontractor, as applicable) or by the public entity *(not included in the page count)*;
- Copies of Respondent's most recent, independently audited, financial statements, as well as those for the preceding year. Include the audit opinion, balance sheet, income statement, statement of retained earnings, statement of cash flows, and the notes to the financial statements. If independently audited financial statements do not exist for the Respondent, document the reason and, instead, submit sufficient information, including financial statements for the two most recent fiscal years, to enable the Department to assess the financial stability of the Respondent. Financial statements must be prepared according to Generally Accepted Accounting Principles (GAAP) as published by the Financial Accounting Standards Board. The Department reserves the right to request that the Respondent submit additional financial information the Department deems necessary to complete its assessment (*not included in the page count*); and
- Submit a copy of the Respondent's most recent SSAE 16 reports or SOC audit report, if applicable for any facilities Respondent proposes or plans to use for performance of the Services. Label it **Confidential** and redact it from the Redacted Version of the Reply (*not included in the page count*).

1.7 Tab 3 – Subcontractor Company Profile(s)

Include the following information for each of Respondent's proposed Subcontractors:

- Organization
  - Company's or individual's name and address;
  - Relationship between the Respondent and the Subcontractor;
  - Reason for and expected benefits of using the Subcontractor;
  - Description of the service(s) and/or product(s) the Subcontractor will be providing;
  - Description of relevant qualifications and experience; and,
  - A statement affirming each Subcontractor's intent to participate in the Project and an understanding of its role and responsibilities.
- Background
  - Full disclosure of any potential conflict of interest (e.g., serving as a reseller of computer hardware, business relationships between the Subcontractor and any of the Department's employees who function or have responsibilities in the review or approval of the undertaking or carrying out of the Project);
  - A statement indicating the financial health/stability of the Subcontractor;
  - Full disclosure as to whether, within the last 10 years, the Subcontractor has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details *(not included in the page count)*;
  - Full disclosure, to the extent the Subcontractor is aware, of any of the following that have occurred within the last 10 years: (a) criminal litigation, proceedings, or Securities Exchange Commission, public agencies, and law enforcement investigations involving the Respondent's Subcontractors or any of its then-current officers or directors; or (b) civil litigation, arbitration or proceeding, to which the Respondent's Subcontractor is a party, and which involves:
    - software systems development or systems integration projects and which either relates to an amount in excess of $1,000,000 or might reasonably be expected to adversely affect the viability or financial stability of Contractor or any Subcontractor hereunder; or
    - a claim or written allegation of fraud, to the extent Contractor is aware, against any Subcontractor hereunder by a governmental or public entity arising out of their business dealings with governmental or public entities.
  - Statement the Respondent shall notify the Purchasing Agent on behalf of the Subcontractor within ten (10) Business Days following the date on which Subcontractor first became aware of any such litigation, investigation, arbitration or other proceeding

(collectively, a "Proceeding"). Details of settlements which are prevented from disclosure by the terms of the settlement may be annotated as such, involving the Respondent during the ITN process for any of the following: a) criminal litigation, proceedings, or Securities Exchange Commission, public agencies, and law enforcement investigations involving the Respondent or any of its then-current officers or directors; or (b) civil litigation, arbitration or proceeding, to which the Subcontractor is a party, and which involves:

- software systems development or systems integration projects and which either relates to an amount in excess of $1,000,000 or might reasonably be expected to adversely affect the viability or financial stability of Subcontractor; or
- a claim or written allegation of fraud against Subcontractor by a governmental or public entity arising out of their business dealings with governmental or public entities *(not included in the page count)*.

- Full disclosure of any public sector software systems development or systems integration contracts of the Respondent's Subcontractor that were terminated for cause or convenience in the past five years *(not included in the page count)*.

1.8 Tab 4 – Client Management Solution Software

1.8.1 Proposed Client Management Software

Include a narrative describing how the proposed Solution will meet the State's Business Requirements, including, at a minimum, the Solution's capabilities to meet the needs of the State. Address the timing of the proposed software licensing, taking into consideration the State's desire to avoid licensing and maintenance costs prior to the time when it is actually needed by the State. Florida's elder client management needs are vast and oftentimes unique, and the narrative should thoroughly describe the proposed Solution's functionality and how it will meet those needs. Describe any strategic advantages of the proposed software that would benefit the State. Describe the end user experience including how the software is accessible, limits the number of clicks, supports navigation, and provides help text. Include a table, using the format of Table D-2a: Format of Proposed Software Listing - Licensing, to list all proposed client management software to be licensed. Include all of the software products, tools, and applications (not hardware) necessary to meet the State's Business Requirements, as provided in the "Source" field in the RTVM tool. Create one table that includes proposed client management software for Phase 1 and any proposed future Phases to include the following:

- One row for each software module if licensing metrics or units vary.
- Use the Stage column to indicate the timing for the license purchase.
- Use the "Ref #" to establish a unique numbering sequence for proposed software. Respondents are to create the reference numbers using their own structure and format.
- Use the Software Module column to indicate the function (module or business need). The Respondent is not expected to include the Business Requirement number from the RTVM in this field.
- Use the Services Included column to include any additional services that may be included (e.g. training or customer support)

Table D-2a: Format of Proposed Software Listing - Licensing

DDI Phase #	Stage	Environment	Ref#	Software Provider	Software	Software Type	Software Module	License Metric Description	# of Units	# of Users Authorized to Use the Software at any Time	Proposed Release/ Version #	License Term	Services Included
1	*Design*	*System Test*	*1*	*Company Name*	*Software Product Name*	*Client Management*	*XYZ Management*	*Per XYZ type of user, defined as…*	*N/A*	*1,000*	*3.16*	*Perpetual*	*2 seats at annual training event*

Include a table, using the format of Table D-2b: Format of Proposed Software Listing - Maintenance/Subscriptions, to list all proposed client management software requiring a subscription/maintenance either in addition to the license above or in place of a license. Include all of the software products, tools, and applications (not hardware) necessary to meet the State's Business Requirements, as provided in the "Source" field in the RTVM. Create one table that includes proposed client management software for Phase 1 and any proposed future phases to include the following:

- One row for each software module.
- Use the Stage column to indicate the timing for the initial Maintenance/Subscription.
- Use the "Ref #" to establish a unique numbering sequence for proposed software. Respondents are to create the reference numbers using their own structure and format.
- Use the Software Module column to indicate the function that the software will satisfy.
- Use the Services included column to include any additional services that may be included (e.g., training or customer support).

Include a copy of all applicable license agreements as Appendix 1 of the Technical Reply.

Table D-2b: Format of Proposed Software Listing – Maintenance/Subscriptions

DDI Phase #	Stage	Ref #	Software Provider	Software	Software Type	Software Module	Maintenance/ Subscription Term	Services Included
1	*Design*	*1*	*Company Name*	*Software Product Name*	*Client Management*	*XYZ Management*	*Annual*	*24-hour customer support*

1.8.2 Module Summaries

In the format of Table D-3: Format of Software Module Summary, include a description of all application software modules defined in the “Source” field of the RTVM. For each module, summarize the key features and functions of that module, as well as the major integration points of the module. The size of the individual reply items may be adjusted as needed, as long as the total reply for each module does not exceed four pages.

Table D-3: Format of Software Module Summary

Product	*The software product for which modules will be described.*
Module Name	*Indicate the module name (e.g., Client Management, Provider Billing), if applicable.*
Listing of Functions	
Provide a bulleted list of the business process functions addressed by the module.	
Narrative Description of Functions	
Describe in narrative form the business process functions addressed by the module. Describe the key features of the module, how the module addresses the pertinent business needs of the State, and any assumptions made in the needs assessment. Describe any considerations of timing and/or sequencing such as Phase or stage.	
Integration Points	
Describe the integration of the module with other modules’ related business processes or other software proposed as part of the Solution. An exhaustive listing of all integration points is not required. The intent is to provide a general understanding of relationships and dependencies between software modules. Provide a diagram illustrating integration.	

1.8.3 Customizations

Include a completed Table D-4: Format of Customization Listing for each customization proposed in response to Business Requirements in the RTVM. Use the “Ref #” to establish a unique numbering sequence for proposed customizations. Provide one row for each customization which represents one or more Business Requirement(s) designated as being met with a customization within the “Support” field in the RTVM. Use the following scale in the Level of Effort column: Low – Less than 80 hours, Medium 80-200 hours, High 200+ hours.

Table D-4: Format of Customization Listing

DDI Phase	Ref #	Software Product	Description of Customization	RTVM Business Requirement Number(s)	Level of Effort
1	*C1*	*Software Product Name*	*A modification to XYZ…*	*AP01, AP02*	*Low – less than 80 hours*

Complete summaries for each proposed customization using the format of Table D-5: Format of Customization Summary below. The size of the individual Reply item may be adjusted as needed, as long as the total Reply for each customization table does not exceed four pages.

Table D-5: Format of Customization Summary

Ref #	*Same as in table above*
Customization Name	*Same as in table above*
Software Product	*The software product to be customized*
Module(s) Name	*Indicate the module(s) name to be customized, if applicable.*
Description of Customization	
Describe the reason for, and a description of, the customization required to meet the business needs of the State.	
Description of Customization Implementation Approach	
Describe the implementation approach and what is included (testing, training, etc.) for the customization required to meet the business needs of the State.	
Complexity of Customization	
Describe the complexity including the level of effort for the customization required to meet the business needs of the State.	
Considerations for Sustaining Customization	
Describe the considerations including the roles and responsibilities for sustaining the customization after implementation.	
Other Implementation Considerations	
Describe other potential implementation considerations that would not require customizing the software, if applicable.	

1.8.4 Software Technical Capabilities

Describe the technical aspects and capabilities of the software, to include:

- Patterns, frameworks, protocols, and tools for data management, including interoperability and integration;
- Operating system and platform support;
- End user client supported platforms and access mechanisms;
- Patch and enhancement management and deployment;
- Application instrumentation processes and tools including root cause analysis;
- Application performance management;
- Administration general support tools;
- Software development languages available;
- Audit tools and processes; and,
- Security and compliance capabilities.

1.9 Tab 5 – Technical Infrastructure

Include a description and detailed capacity and performance specifications of the proposed hardware (i.e., technical infrastructure) for the Client Management Software solution. Also include a plan for staging the procurement of the hardware based on the deployment approach to enable the State to avoid the costs of purchasing and maintaining hardware prior to the time when it is actually needed by the State. Identify and list all hardware, disk storage capacity, communications equipment, including any and all servers, routers, disk arrays, cloud services, or other services necessary to operate the Solution and to support the Project. Include all of the purchased and leased equipment, as well as the temporary hosting services at the beginning of the Project, in this itemized list.

Use the format of Table D-6: Format of Technical Infrastructure Listing below for all technical infrastructure items related to the Solution. Use the "Ref #" to establish a unique numbering sequence for infrastructure for the Solution. Respondents are to create the reference numbers using their own structure and format.

Table D-6: Format of Technical Infrastructure Listing

DDI Phase	Ref #	Production or Non-Production	Description	Type (3rd party hosted, on premise, cloud)	Quantity	Maintenance Included?
1	*H1*	*Non-Production*	*Hardware Product Name*	*On Premise*	*1*	*Yes*

1.10 Tab 6 – Respondent References

Include at least three client references for the Respondent. The Respondent will include references for the two projects used to meet the Mandatory Minimum Qualifications in ITN Section 1.4(j). Include references for systems in production at this time.

The Respondent shall provide Attachment F – Reference Form to the client for completion. The information must be provided independently and directly by each client reference. It is the Respondent's responsibility to obtain the completed references from the client in Attachment F – Reference Form and include the completed and signed forms in Tab 6 of the Reply.

The Department or its representative may contact these references at any point during the procurement.

1.11 Tab 7 - Project Approach, Methodology, and Phasing

Include the proposed implementation approach and methodology for the Project, taking into account the considerations included in Section 5 of ITN Attachment B – Project Specifications to accomplish the Solution goals in ITN Section 1.3. Provide a description of what software/functionality/modules and implementation services will be implemented by Phase based on the proposed implementation approach and methodology. Describe how the proposed project schedule with go/no-go decisions and staffing plan aligns with the implementation Phases. The Respondent is expected to provide a thorough explanation of its rationale for its proposed phasing, staging, and go/no-go decision points. Include the overall approach to maintaining the integrity of the State's client case management data, as well as an approach for producing the mandatory Federal reporting, including National Aging Program Information System (NAPIS) State Program Reports and Older Americans Act (OAA) Program reports, during deployment. Describe how the approach minimizes risk to the State. Describe how the proposed Solution satisfies the Solution goals in ITN Section 1.3.2.

1.11.1 Implementation Assumptions and Risks

Include a list of assumptions and constraints on which the Respondent's project approach and phasing are based. To the extent reasonably foreseeable, address the consequences of the failure of each assumption to be true, in terms of changes to schedule or the Respondent's performance of the Services. Do not include specific cost consequences in this section.

Use the format of Table D-7 Format of Risk Listing below to identify major risks associated with the implementation, contemplating each Phase, stage, and services, a description of how the Respondent proposes to mitigate it, probability of the risk occurring, and impact if the risk realizes (utilizing the Pre-DDI PMP risk ratings). Use the "Ref #" column to establish a unique numbering sequence for infrastructure for the Solution. Respondents are to create the reference numbers using their own structure and format.

Table D-7: Format of Risk Listing

DDI Phase	Stage	Related Service(s)	Ref #	Title	Description	Mitigation Strategy	Probability	Impact
1	*Planning*	*Organizational Change Management*	*1*	*<Risk Title>*	*<Risk Description>*	*<Mitigation Strategy>*	*5*	*5*

1.11.2 Lessons Learned

Include a discussion of the significant lessons learned from experience on previous public sector projects of similar size, scope, and complexity, as well as how the Respondent plans to apply those lessons to the proposed methodology to be used for the Department's Project.

1.11.3 Renewal Periods

In accordance with Section 287.058, Florida Statutes, describe an approach for providing Software and System Integrator Services across one or more renewal periods including timing.

1.12 Tab 8 – Draft Statement of Work – Implementation Services

Include a draft Statement of Work organized by the Respondent's proposed Phasing in its Implementation approach, reflecting any differences, assumptions, transitions, constraints, and overlap among the Phases and describe the Services to be provided to meet the State's Business Requirements, in accordance with the Respondent's proposed project plan and methodology, and include descriptions of all Solution Deliverables, Project Deliverables, and Work Products to be provided, as well as roles and responsibilities. The Respondent is encouraged to include innovative services (within the requested Implementation Services) needed to implement the proposed approach. Clearly articulate the Services the Respondent will provide to implement the proposed Solution and not alternatives.

1.12.1 Statement of Work - Organization

Organize Replies for Tab 8 – Draft Statement of Work to follow the order and structure of Implementation Services as reflected in Section 5 of Attachment B – Project Specifications utilizing the following format for each Implementation Service:

1.0 – Implementation Service

A. Services to be Provided

B. Deliverables and Work Products

C. Tools

D. Responsibility Matrix

Include in the Reply the format of A-D (above) for each Implementation Service identified in Section 5 of ITN Attachment B – Project Specifications, and Section 6 of ITN Attachment B, including the components of the Implementation Service (e.g., include information related to Sections 6.1.1 – 6.1.12 within one A-D reply for Section 6.1).

A. Services to be Provided

Describe, at a minimum, the Respondent's methodology and approach to each Service area, including each of the Services and minimum Project Deliverables listed in Section 5 of ITN Attachment B – Project Specifications. Include the following in the description:

- Demonstrated understanding of the requested services included within Section 5 of ITN Attachment B – Project Specifications;
- High-level timeline, such as stage, including any dependencies and constraints to other services;
- Description of how the Deliverables, Work Products, and support tools support the Implementation Service;
- Description of how proposed staffing (listed in Tab 10) supports delivery of the Implementation Service;
- Description of how support tools support the delivery of the Implementation Service;
- Relationships to, and impacts on, other services, including the critical dimensions of the Project (process, people, technology, and project management);
- Example(s) and detailed description of where the proposed approach has been successfully utilized on other projects;
- Any challenges specific to the State or the Project and how those challenges will be addressed; and,
- Assumptions and/or constraints that impact the methodology and approach.

Include in the Reply the information requested below.

B. Deliverables and Work Products

Use the following format for Table D-8: Format of Deliverables and Work Products Listing to list proposed Project Deliverables and Work Products for each Service area. At a minimum, include the Solution Deliverables and minimum Project Deliverables in Section 5 of ITN Attachment B – Project Specifications and specify any additional Project Deliverables pertinent to Respondent's methodology. Use the "Ref #" to establish a unique numbering sequence for proposed Deliverables and Work Products. If revised or new versions (those Deliverables required to be "updated at specified intervals") of the Deliverable or Work Product will be submitted in multiple stages, include a unique row for each stage (e.g., if the Project Schedule is submitted as a Deliverable in three (3) stages – include three rows). Any Deliverables identified as major Deliverables include review and approval by the Executive Steering Committee as identified in the eCIRTS Project Management Plan (Pre-DDI PMP).

Table D-8: Format of Project Deliverables and Work Products Listing

Ref #	DDI Phase	Stage	Service Area	Item Type *(Solution Deliverable, Project Deliverable, Work Product)*	Deliverable Name	Proposed Acceptance Criteria	Month/ Year Delivered	Anticipated Acceptance Date	Major? (Y/N)
1	*1*	*Planning*	*Project Mgt.*	*Project Deliverable*	*Project Schedule*	*Describe key components of the deliverable*	*##/##*	*##/##/##*	Y

C. <u>Tools</u>

Include a table, using the format of the tables below, to list all proposed support tools (software products, tools, and applications, and support tool hardware) that will be utilized in the delivery of the Implementation Services. Do not include the proposed Client Management Solution software and hardware listed in Tables D-2a or D-2b or hardware listed in Table D-6. Use the "Ref #" to establish a unique numbering sequence for proposed tools. Provide one row for each tool unless licensing or subscription metrics or units vary. Include a copy of all applicable license and maintenance agreements as Appendix 1 of the Technical Reply.

Table D-9a: Format of Proposed Support Tools Listing

DDI Phase #	Ref #	Environment(s), if applicable	Tool Provider	Tool	Tool Type	License/ Subscription Metric	# of Units	Release/ Version #	Maintenance Included?
1	*1*	*Performance Test*	*Company Name*	*Tool Name*	*Database tuning*	*Per tool*	*3*	*2.1*	*No*

Use the format of Table D-9b: Format of Support Tools Technical Infrastructure Listing below for all technical infrastructure items related to the Support Tools. Use the "Ref #" to establish a unique numbering sequence for infrastructure for the Solution. Respondents are to create the reference numbers using their own structure and format.

Table D-9b: Format of Support Tools Technical Infrastructure Listing

DDI Phase	Ref #	Description	Type (3rd party hosted, on premise, cloud)	Quantity	Maintenance Included?
1	*1*	*Hardware Name and Description*	*Cloud*	*1*	*Yes*

D. Responsibility Matrix

Use the following Table D-10: Format of Responsibility Matrix for each Service area, to indicate whether the Respondent or the Department will have a lead or assist role for each activity. If the responsibility replicates in multiple stages, include the appropriate stage names in the Stage column. If the responsibility is the same for all stages, include "All" in the Stage column.

Table D-10: Format of Responsibility Matrix

DDI Phase	Stage	Service Area	Activity	Respondent	Department
1	*Planning*	*Project Management*	*Create Project Schedules*	*Lead*	*Assist*

1.12.2 Statement of Work – Reply Details

1.12.2.1 Project Management, Governance, and Oversight

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.1 of ITN Attachment B – Project Specifications, and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe how the proposed methodology will be integrated into the Project Management Plan (PMP). Provide the following requested information:

- Description of methods and tools that will be used to measure and assess performance efficiency, progress, productivity, and quality;
- Description of the Project Portfolio Management (PPM) as described in Section 6.1.3 of ITN Attachment B, and other project support tool(s) that will be used to manage the Project, including how any proposed data collection tool(s) will be integrated with the Department's SharePoint document management system and other data collection points to produce project management metrics; and,
- Sample of a weekly status report *(requested samples are not included in page count).*

Review the existing Pre-DDI PMP and supplemental documentation and assess whether the Respondent considers this documentation sufficiently comprehensive to address the DDI development, execution, monitoring, and reporting of the project management processes. Describe each of the following in the Reply:

- Areas that will need to be addressed for the DDI Phase;
- How the PMP will be maintained throughout the phase;
- How the PMP and other project management processes relate to other plans developed in support of project activities;
- Approach to operationalizing each PMP process area;
- How Respondent's project management approach conforms to the Agency for State Technology (AST) project management standards (Chapter 74-1, Florida Administrative

Code) and gaps where the Respondent's project methodology deviates from the standards (including information may be used as justification for the exception process);

- How the Respondent will collaborate with the AST in order to provide the necessary data and reports to support compliance;
- How the Respondent will collaborate with the Independent Verification and Validation (IV&V) contractor and support compliance with IV&V policies and procedures when describing its compliance and conformance approach;
- How requested project management documentation will be met. Recommend the use of either the Department's SharePoint or another document management system; and,
- Provide the following information for specific areas of the PMP:

    - **Performance Management** – Provide examples of dashboards that have been used to monitor Key Performance Indicators (KPIs) and Key Performance Measures (KPMs). Describe the process for the successful development of Project Deliverables and achievement of Solution Deliverables and how performance will be managed throughout the life of the Project *(requested samples are not included in the page count).*
    - **Schedule Management** – Describe how the project schedule will be managed throughout the Project, as well as the approach to forecasting (e.g., Monte Carlo, Program Evaluation Review Technique [PERT]). In addition, describe what process will be used to take action based on the metrics identified in the earned value analysis, including a specific example of what actions might be taken to address variances. Provide examples of reports that will be used for schedule management (e.g., four-week look ahead, critical path analysis) *(requested samples are not included in the page count)*.
    - **Project Scope and Change Management** – Describe the recommended approach and structure for the Project's change control board and relationship to overall Project governance, as well as a diagram depicting the proposed Project scope and change management process. Include the approach for analyzing potential law or rule and other changes without impacting schedule.
    - **Quality Management** – Describe the recommended approach for quality management including activities to validate both the planning and execution of tasks and the creation of deliverables are aligned to achieve high-quality results and overall Project success.
    - **Risk Management** – Provide a detailed risk management plan that describes the processes and procedures that will be used to identify, monitor, and manage risk factors throughout the system development and project life cycle. Define the risk management methodology that will be used, risk assumptions, roles and responsibilities, timeframes, risk rating techniques, risk thresholds, risk communications, and risk tracking procedures.
    - **Issue Management** – Describe the issue management strategies that will be used to make sure that issues are managed efficiently and effectively. Include proactive strategies to prevent issues from occurring and, if issues develop, strategies to resolve them and prevent them from reoccurring. Include issue management procedures for

the purpose of tracking and reporting of outstanding issues, name(s) of the staff responsible for problem resolution and the target length of time from report to resolution.

Review the existing Project Charter (See ITN Section 1.10) and include recommendations for modifications/additions to the charters and answer the following questions:

- How will potential policy changes be monitored and analyzed for their potential Project impacts?
- What other components of governance need to be documented for the implementation of the Project beyond decision making?
- What decisions does the Respondent plan to make without the Department's approval?
- What is the difference between a decision and Project change request?

1.12.2.2 Organizational Readiness and Communication

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.2 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Provide a high-level stakeholder assessment, as well as representative samples of communication materials for each proposed Project stage, demonstrating a variety of vehicles. Describe how different types of information will be disseminated (e.g., voice, email, spreadsheet, formal presentation) to different stakeholder groups (e.g., end users, Department support staff, oversight entities, Executive Steering Committee, Executive and Legislative partners) and the frequency of each type, as well as how the communications plan will be kept current throughout the Project. Describe how the different stakeholder groups will be supported *(requested samples are not included in the page count).*

1.12.2.3 Technical Architecture

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.3 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed technical architecture and technical architecture approach and to providing the requested technical architecture services.

Review the CMS Seven Conditions and Standards (https://www.medicaid.gov/medicaid-chip-program-information/by-topics/data-and-systems/downloads/efr-seven-conditions-and-standards.pdf) and the Standards and Conditions for Medicaid IT (https://www.ecfr.gov/cgi-bin/text-idx?SID=73623734a5631f2247b8f16ae810fd5a&mc=true&node=se42.4.433_1112&rgn=div8) and, in the Respondent's Reply, provide comments on the completeness of the documentation and how it will be used to both respond to this procurement and to develop the eCIRTS Solution.

Identify the Respondent's proposed technical architecture framework to be used in the design and Implementation of the Solution. Explain how the architecture framework will serve as an umbrella approach to developing the infrastructure and keeping the business processes and data models in alignment. Articulate how the overarching technical architecture will provide support for the Implementation Service(s).

Provide a high-level diagram and a conceptual description of the entire architecture to be used for the Project and identify how all major business functions are covered by the proposed Solution and other software, tools, interfaces, and environments. In the description, cover all aspects of the Solution, including hardware, primary client management software product, other package software, custom development, interface points, conversion points, communication points and methods, and security controls necessary to successfully meet the Business Requirements.

1.12.2.4 Solution Analysis and Design

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.4 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed Solution analysis and design approach including how it aligns with the technical architecture approach. Describe the approach for guiding the Department through finalizing Business Requirements (Gap/Fit), which will be used to build the Solution design. Include in the approach how the Respondent will confirm the Business Requirements are documented and controlled throughout the process, including how the Respondent's methodology will integrate with a requirements traceability matrix. Describe end user and stakeholder involvement (including roles) in Solution analysis and design activities.

Review the State's proposed Business Process Reengineering (BPR) Process Flows (See ITN Section 1.10) developed during the Pre-DDI Phase and provide comments as to any observed deficiencies or concerns with the proposed processes working with the proposed Solution. Describe how the State's proposed to-be business process flows (which identify items such as case management, integration points, internal controls, and reports) will be used and incorporated throughout the Project.

Describe an approach for implementing the State's reporting needs, including addressing report complexity (standard versus custom).

Indicate any services the Respondent believes are necessary to clarify, formalize, or finalize scope. Explain the expected process and timing for identification and finalization of those the Business Requirements. Also describe Respondent's expectation of the Department in identifying its Business Requirements regarding usability, data quality, throughput, and process performance time. In the approach, specify the Phase and stage of the Project where these will be identified and confirmed and how the Business Requirements management and performance management processes will be updated.

Highlight how sound internal controls will be considered and incorporated throughout the Project, including the relevant tools, protocols, and industry guidance that will be employed in the execution of the Solution analysis and design services.

Include an explanation of how the activities of business process standardization and Business Requirements management will impact or be represented in the functional Solution design activities.

1.12.2.5 Application Configuration, Development, and Maintenance

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.5 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed application configuration and development methodology including the role and level of involvement of the functional and technical staff, end users and stakeholders. Also include Respondent's proposed Information Systems Design Methodology (ISDM) that is defined, documented, and repeatable, and emphasizes current industry best practices. Identify any certifications the Respondent has received related to its methodology.

Describe the training and certifications of application configuration and application development resources that are associated with the Respondent's application development methodology (identifying Respondent's proposed project staff that have received this training and certification within Tab 10).

Describe how configuration, customizations, reports, forms, queries, workflows, data integration, and data conversion designs will be managed and released. Describe the Respondent's proposed software update process for defect resolution once the Solution is in production. Include in the description the steps involved in the development, testing, and validation process before updates are released and made available to the Solution customers. While customers may have unique aspects of handling updates, include the generic steps recommended by the software vendor for the acquisition, review, testing, and deployment of updates. Also, include any tools or services provided by the primary software product provider that will facilitate this process.

1.12.2.6 Interfaces and Integration

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.6 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe, in detail, the Respondent's proposed interface and integration approach, including how it aligns with the technical architecture approach. Include the approach to interfaces planned for eCIRTS and how information about interfaces will be communicated to stakeholders in time for their planning, design, development, testing, and Implementation activities.

The Department has developed an inventory of current interfaces for Agency for Health Care Administration (AHCA) Florida Medicaid Management Information System (FMMIS), AHCA Enrollment Broker, Department of Children and Families (DCF) Automated Community Connection to Economic Self Sufficiency (ACCESS), Department of Financial Services (DFS) Florida Accounting Information Resource (FLAIR), and Department of Health (DOH) Bureau of Vital Statistics interfaces (the current state), in addition to the conceptual integration points on the BPR To-Be Process Flows (the target-state). Review the existing AHCA FMMIS, AHCA Enrollment Broker, DCF ACCESS, DFS

FLAIR, and DOH Vital Statistics interfaces and BPR integration points and, in Respondent's Reply, provide comments on the following:

- Completeness of the Project's interface and integration documentation and how the documentation will be used to both respond to this procurement and to develop the eCIRTS Solution;
- Approach for temporary interfaces with AHCA FMMIS, AHCA Enrollment Broker, DCF ACCESS, DFS FLAIR, and DOH Vital Statistics;
- Approach for each AHCA FMMIS, AHCA Enrollment Broker, DCF ACCESS, DFS FLAIR, and DOH Vital Statistics integration;
- Approach for integration with agency business systems; and
- Approach for integration with third-party systems.

1.12.2.7 Data Conversion and Data Migration

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.7 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe proposed data conversion and data migration strategies considering the implementation schedule, plans for agency waves and fiscal year closings. Review the CMS Seven Conditions and Standards and the Standards and Conditions for Medicaid IT (See ITN Section 1.10) for considerations and guidance in the area of data conversion and data migration. Be specific as to Respondent's recommendations and proposal with respect to the number of years of legacy data that will be migrated to the new Solution (including justification for the number of years) and how any legacy data Respondent does not propose to migrate to the new Solution would be maintained and kept accessible to the new Solution as archive data. Include the Respondent's proposed approach to mock conversions, including multiple iterations, controls, and the effect of data conversion and migration activities on the Implementation schedule.

1.12.2.8 Data Architecture

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.8 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed data architecture approach considering the CMS Seven Conditions and Standards, the Standards and Conditions for Medicaid IT, Attachment A - Overview of the Current Program, MMIS Systems, and other Agency business systems. Also demonstrate how the data architecture approach aligns with the technical architecture approach. Include the approach to the proposed data warehouse and business intelligence solution. Include access data from both current and new sources and discuss how the Respondent will meet business needs.

1.12.2.9 System Infrastructure

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.9 of ITN Attachment B – Project Specifications, the Solution Deliverables listed in Section

5.3 of ITN Attachment B – Project Specifications below, and how the proposed system infrastructure supports implementation of the Client Management Solution. Describe how the proposed system infrastructure architecture approach including how it aligns with the Implementation Services throughout the Project lifecycle and the technical architecture approach. Include a discussion of Respondent's proposed approach for integrating with the Department's existing environments where applicable. Provide a description of Respondent's plan for establishing the production and non-production environments, including any proposed on-premise, third party hosting (temporary or permanent), cloud, or hybrid environment scenarios. Describe the scalability and openness of the proposed architecture to allow the Department to address anticipated growth and change.

Explain the Respondent's proposed approach to patch management and upgrades, any patches and/or upgrades planned during Implementation period, and also describe the risks of the Department not being on the latest software versions.

Describe the Respondent's proposed approach to disaster recovery and define functional areas covered by the plan, such as communications, hardware recovery, systems recovery, network recovery (in coordination with the Department's network contractor), storage recovery, applications recovery, data recovery, Contractor coordination, damage assessment, and logistics. Also describe the proposed disaster recovery process, rollback process, and related activities during deployments.

Identify the environments to be used through the life cycle of development and implementation of the Solution. Include any temporary environments for starting development, as well as formal development, testing, production, sandbox, and other environments recommended by the Respondent. Provide information about the proposed environments including the number of instances and capabilities and the Project Phase and stage when each will first be set up.

1.12.2.10 Security and Technical Compliance

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.10 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed security approach. Provide a detailed list of Federal, State, and legislative regulatory compliance standards supported out of the box by the proposed Solution. In addition, provide the cloud provider's security certification reports if a portion(s) of the proposed Solution will be hosted in a cloud or Software-as-a-Service (SaaS) environment. Describe Respondent's approach to information technology controls with respect to all Solution system(s) and services.

Describe the Respondent's approach to providing the final security and technical compliance certification package and how it will establish that the security and technical compliance, design, implementation, and test results were properly completed and that all security and technical compliance issues were resolved appropriately. Review the HIPAA Security Rule (see 45 CFR Part 160 and Subparts A and C of Part 164), Safeguarding Information on Applicants and Beneficiaries (see 42 CFR Part 431, Subpart F), and the Florida Cybersecurity Standards (see Chapter 74-2, Florida Administrative Code), and describe how the proposed approach to security and technical compliance will conform or comply, or identify any gaps and how they will be addressed.

1.12.2.11 Testing

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.11 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed testing approach and plan (e.g., number of cycles, entry/exit criteria, roles and involvement of end users and stakeholders, waved rollout considerations), in accordance with Respondent's proposed application architecture and Implementation schedule. Include the Respondent's description of recommended testing and testing validation methodology to be utilized for data migration and interface development, system integration, and final system testing. Describe Respondent's approach to parallel testing or comparative testing between CIRTS and the Solution.

1.12.2.12 Knowledge Transfer

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.12 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed knowledge transfer approach to the Department including the approach to identify, assess, and support knowledge transfer services with functional and technical support staff.

Use the format in Table D-11: Format of Recommended Project Team Training for recommended Project Team training.

Table D-11: Format of Recommended Project Team Training

Ref #	Course Title/Description	Duration (Business Days)	Delivery Method	Location	# of DOEA Project Team Members	DOEA Project Team Role(s)
PT1	*Software 1*	*5*	*In person*	*Tampa*	*8*	*BPR Team*

1.12.2.13 End User Training

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.13 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed end user training approach. Describe how Respondent's approach for developing and delivering training services interact, support, or are supported by organizational readiness, communications and knowledge transfer activities. Describe Respondent's approach to curriculum and course development, as well as the timing of training to coincide with waved rollout, including a sample proposed course catalog. Describe how and when it will use Web-based training, classroom training, and train-the-trainer methods and how these methods will be measured for effectiveness. Provide representative samples of training materials that Respondent has delivered using a variety of vehicles. Describe the online help functions that will be delivered with the proposed software and the process available, if any, to customize the online help to support the software as configured and customized (if necessary) to meet the Department's business needs. Provide the number of recommended Department trainers *(requested samples are not included in the page count)*.

1.12.2.14 eCIRTS Help Desk

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.14 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below, considering how the help desk will scale over the course of the Project. Describe the Respondent's proposed help desk approach. Describe the incorporation of the Department's existing help desk structure and how and when incidents will be assigned to either Department or Respondent staff.

1.12.2.15 Deployment and Post-Implementation Support

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 6.15 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed deployment and post-implementation support approach. In addition, include answers to the following questions:

- How will the purpose and objectives of the pilot wave be validated?
- How will eCIRTS become the system of record for client management?
- What type of monitoring of environment and performance will be conducted?
- How will end users be supported during deployment and post-implementation(s)?
- What activities will occur during the post go-live stabilization period?
- What type of contingency is planned for business and system continuity?
- How will documentation be accessed and maintained after implementation(s)?
- What type of warranty will be offered and how will issues that fall under warranty/post-implementation enhancements be addressed?
- What are the proposed performance measures to be included within a service level agreement aligned to the Respondent's post-implementation responsibilities?

1.12.2.16 Transition

Include the approach to each of the Services and minimum Project Deliverables/Work Products listed in Section 7 of ITN Attachment B – Project Specifications and the Solution Deliverables listed in Section 5.3 of ITN Attachment B – Project Specifications below. Describe the Respondent's proposed transition services.

1.13 Tab 9 – Proposed Project Staff

Review the Project's current organizational chart and include the recommended Department staffing in the Respondent's proposed Project staffing approach. Include a description of the Respondent's Project staffing approach and proposed organization to coincide with its recommended phasing approach, considering Section 4 of ITN Attachment B – Project Specifications. As part of this Project staffing approach, describe when the Department's participation is expected, the skillset expectations for each role, how the Department's employees are going to be integrated into the Project Team, and what methods are going to be used to enable skills development and knowledge transfer. Provide a proposed organizational chart, by role, for the entire Project Team that defines key roles and reporting relationships among team members, and explain how the organization chart supports the Project, along the dimensions of project management, people, process, and technology.

1.13.1 Staffing Summary

Use the following format in Table D-12a: Format of Proposed Respondent Project Staff, to list all of the proposed staff, including Subcontractors. Include related previous project experience and specify where Key Staff worked together on the same project. For any staff that are not yet known, include the proposed role, expected experience, and certifications if applicable, (leaving the remainder of the columns in Table D-12a blank). For any Client and Project listed in Table D-12a, include a table using the format in D-12b: Format of Staff Experience Project Summary.

Table D-12a: Format of Proposed Respondent Project Staff

Proposed Role(s)	Consultant Name	Key Staff (Yes/ No)	Employer Organization	Years Working for Employer Organization	Years Working with Proposed Software	Years Working in Public Sector	Years Working in Proposed Role	Years Working with the Proposed Methodology	Reference #1 (Employer Organization, Client and Project Name)	Reference #2 (Employer Organization Client and Project Name)	Reference #3 (Employer Organization Client and Project Name)	Certifica -tions
P2P Functional Lead	*John Smith*	*Yes*	*Respondent Name*	*10*	*12*	*12*	*5*	*1*	*Respondent Name* *Org 1* *Project 1*	*Respondent Name* *Org 2* *Project 2*	*Previous Employer Name* *Org 3* *Project 3*	*CPA*
SOA Interface Developer	*Jane Smith*	*No*	*Subcontractor Name*	*3*	*3*	*1*	*3*	*1*	*N/A*	*N/A*	*N/A*	*TOGAF 9.1*

Table D-12b: Format of Staff Experience Project Summary

Client Name	Project Name	Total Annual Spend	Total Head Count	Scope of Project
State of XYZ	*Project ABC*	*$1,000,000*	*2500*	*General description of the scope of the Project*

Create a staffing spreadsheet utilizing the format in Table D-13: Format of Proposed Staffing Plan that contains roles and full-time equivalents (FTEs) for proposed Contractor (and Subcontractor) staff by month and by fiscal year. Include summary rows as deemed necessary.

Table D-13: Format of Proposed Staffing Plan

			FY 18/19	FY 18/19	FY 18/19	FY 18/19	FY 18/19	FY 18/19	…
Ref #	**Project Dimension Supported**	**Role**	**July**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**	**…**
	Project Management	*Project Manager*			*1*	*1*	*1*	*1*	
	Process	*GL Lead*				*.5*	*1*	*1*	

Provide a staffing spreadsheet utilizing the format in Table D-14: Format of Recommended Department Project Team Staffing Plan to support the Responsibility Matrix in each section of Tab 9 that contains all proposed roles for Department staff by fiscal year, including the recommended FTEs for each proposed role by critical dimensions of the Project (process, people, technology, and project management), and a brief description of each role, including the role's responsibilities. Additional columns/fiscal years may be added.

Table D-14: Format of Recommended Department Project Team Staffing Plan

Project Team Roles	Brief Description of Role	Fiscal Year 20##/20##	Fiscal Year 20##/20##	Fiscal Year 20##/20##
Project Management:				
Project Manager	*Provide project management oversight for the Project.*	*1*	*1*	*1*
Process:				

Project Team Roles	Brief Description of Role	Fiscal Year 20##/20##	Fiscal Year 20##/20##	Fiscal Year 20##/20##
Technology:				
People:				

1.13.2 Resumes

Include resumes for each role to be filled by the Respondent's Key Staff assigned to the Project *(max 2 page per person).* The Respondent may include resumes of other staff that serve as a representation of the level and experience of staff who could be assigned to the Project. Include the following information in resumes:

- Name of individual;
- Employer Organization;
- Education and training;
- Summary of relevant experience (including start and end dates);
- Experience implementing the primary client management software product;
- Three references (name, title, organization, and phone number); and
- Other relevant experience.

1.14 Tab 10 – Alternative Services

Respondents are encouraged to describe their proposed approach to the requested Services within Tab 8. Within Tab 10, describe alternative services that would, in the Respondent's opinion, optimize the Solution by either supplementing/replacing an existing Implementation Service or offering an alternative Implementation Service. Alternative services included in Tab 10 should be distinct from those Services proposed as part of Tab 8.

Do not propose any alternative services for services considered out of scope for this ITN, as defined in Section 5 of Attachment B – Project Specifications. Specifically, do not recommend alternative services for any functionality that duplicates any of the other information subsystems of AHCA FMMIS or any agency business processes related to any of the functions included in the Personnel Information System, the Purchasing Subsystem, or the Legislative Appropriations System/Planning and Budgeting Subsystem.

Use the format of Table D-16: Format of Alternative Services Listing to provide a listing of all proposed alternative services within Tab 10. Use the "Ref #" to establish a unique numbering sequence for each for alternative service. Respondents are to create the reference numbers using their own structure and format.

Table D-16: Format of Alternative Services Listing

Ref #	DDI Phase(s)	Service Name	Related Implementation Service(s) *(if applicable)*	Related Solution Deliverable(s) and/or Project Deliverable(s) *(if applicable)*

Utilizing the table of Alternative Services Listing, thoroughly describe in detail each proposed alternative service including:

- Rationale for the Respondent's recommendation;
- Applicable Implementation Phase(s) and service(s);
- Applicable Solution Deliverable(s) proposed as part of Tab 8 or alternative Solution Deliverable(s);
- Applicable Project Deliverable(s) proposed as part of Tab 8 or alternative Project Deliverable(s);
- Value to the State; and
- Successful Implementation of the alternatives during a previous Project.

Alternative services can include alternate technical architecture services (i.e., a hybrid of on premise and cloud services, or cloud only).

1.15 Tab 11 – SSI Contract Exceptions

Use the table below to indicate any issues with the proposed contract terms presented in Attachment G – SSI Contract. Identify in the "Issue" column when the topic could be a cost driver, if applicable, but do not include any costs in the Technical Reply.

Table D-17: SSI Contract Issues

Section #	Topic	Issue	Recommended resolution

1.16 Appendix 1 - Proposed License and Maintenance Agreements

Include a copy of all applicable license and maintenance agreements as Appendix 1 of the Technical Reply for any software listed in Table D-2a of Tab 4, Table D-2b of Tab 4, Table D-9a of Tab 8, and Table D-9b of Tab 8.

1.17 Appendix 2 - Implementation Road Maps

Include a set of visuals as Appendix 2 of the Technical Reply that illustrate the following, consistent with the Project Approach, Methodology, and Phasing described in Tab 7:

- Relationship between Solution Deliverables, Project Deliverables, and Work Products, by stage and submission date;
- How the strategies relate to each other and support the Implementation;
- Number of staff, both Department and Respondent (including Subcontractor staff), necessary to produce each Solution Deliverable;
- Relationship between Solution Deliverables to Respondent's identified risks, including mitigation considerations;
- Relationship between the technology critical dimension (described below) and Solution Deliverables over time; and
- Solution Deliverables' support of fulfillment of the Solution Goals identified in ITN Section 1.3.

Provide visuals in the form of diagrams, not a Microsoft Project schedule, to display relationships. Label each icon on the visual (or use color coding) to represent the Deliverable/Work Product relationship to each critical dimension (project management, people, process, and technology).

1.18 Appendix 3 - Project Schedule and WBS

Include a Microsoft Project schedule that demonstrates the relationship between the work to be performed and the Deliverables and Work Products to be provided. For the digital copy, include a .PDF version of the schedule and a Microsoft Project 2013 version as Appendix 3 of the Technical Reply. At a minimum, include the following information in the proposed project schedule:

- Be organized by Phase, stage, Solution Deliverables, Project Deliverables, and Work Products, including go/no-go decision points;
- Tasks with duration and start/finish dates, including setting a Project start date;
- Tasks with duration and start/finish dates for delivery, review cycles, and acceptance for Solution Deliverables and Project Deliverables;
- Task dependencies identified in the predecessors and successors fields;
- Resource sheet (Respondent and Department) that corresponds with the roles provided in the Reply for Tab 10 – Proposed Project Staff; and,
- Assignments of resources to tasks (Respondent and Department).

Include a work breakdown structure (WBS) created separate from the Microsoft Project schedule that displays the Project activities (which could include Phase, stage, Solution Deliverables, Project Deliverables, and Work Products, including go/no-go decision points) in a hierarchical decomposition of the work to be executed by the Project Team.

1.19 Appendix 4 - Product Road Map

Include a product road map as Appendix 4 of the Technical Reply for the proposed primary client software product and supporting tools, including future plans for public sector functionality for the components of the proposed Solution within five pages. In the product road map, explain how the Business Requirements marked in the Date Available field in the RTVM as PH1 - Near Term, FUTR - Near Term, PH1 - Long Term, or FUTR - Long Term are accounted for in the product road map.