FLORIDA DEPARTMENT OF EDUCATION

BUREAU OF CONTRACTS, GRANTS AND PROCUREMENT MANAGEMENT SERVICES
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Addendum #3

RFI NO.: RFI 2018-61

DATE
February 22, 2018

This addendum is being issued to provide the Answers to Questions submitted timely by vendors during the Question and Answers period.

Please be advised all questions are keyed as submitted.

Seven Outsource

Question 1. Whether companies from Outside USA can apply for this?
(like, from India or Canada)

Answer 1. Yes, however you have an office in the USA

Question 2. Whether we need to come over there for meetings?

Answer 2. Yes.

Question 3. Can we perform the tasks (related to RFP) outside USA?
(like, from India or Canada)

Answer 3. No.

Question 4. Can we submit the proposals via email?

Answer 4. No.

Folderit.net

Question 5. In regards with the RFI 2018-061, are you considering a custom software development as an option?

Answer 5. This is a Request for Information (RFI). The information is unknown, at this time.

Deltek

Question 6. Has funding been secured for this project at this point? If so, does the Department have an estimated spend amount?

Answer 6. See Answer # 5

Question 7. If the Department does elect to move beyond the RFI, is there an anticipated solicitation release or project start date?

Answer 7. No.

Question 8. The RFI notes that there is currently a primarily built system for the RIMS system. Is the Department contracted with any vendors or any particular component of this system, or any related services from a third party?

Answer 8. No.

MicroPact

Question 9. Section III of the RFI states the VR program will need to support approximately 1,400 users located in 97 offices statewide. The information provided should be for solutions that are able to support 1,500 concurrent users with role based security levels. Can the Department please list out the user types and roles of those concurrent users?

a. Of those 1,500 concurrent users, how many of those will be Counselors?
b. Of those 1,500 concurrent users, how many of those will be external users (ex. clients or providers accessing a public facing portal).

Answer 9. a. Approximately 800 users will fulfil the counseling role.

b. Depends on the solution but expected upwards of 400

Question 10. Does the Department have a software framework preference? Java vs .NET?

Answer 10. Our preference is .NET

Question 11. Has the Legislative Budget Request been approved for this project?

Answer 11. This is an RFI. No decisions has been made to determine if a formal solicitation will be released.

Question 12. What is the anticipated budget for this project?

Answer 12. See Answer 5.

Pegasystem

Question 13. As part of the evaluation process, will the agency review analyst rankings for BPM Case Management Frameworks?

Answer 13. See Answer 5.

Question 14. Is a solution that offers hosted applications in multi-tenant cloud architecture acceptable or does the agency prefer a flexibility to choose options (on premise, 3rd party cloud, vendor cloud, or hybrid) to avoid vendor lock?

Answer 14. We are open based upon solution, as long as the Agency's security, retention and disaster recovery requirements can be met.

Question 15. Will WCAG 2 AA standards be required as part of the evaluation (a standard now being used by Section 508)?

Answer 15. Yes, as a Title 2 entity under ADA, we would be looking for the solution to meet standards.

Question 16. Please list any mobile requirements. For example, is responsive and adaptive UI technology for omni-channel (mobile) deployment required? If so, is the desire to have a solution capable of managing cases across all channels without needing to make process or development changes in multiple technologies?

Answer 16. See Answer 5.

Vertiba

Question 17. Could the Department describe the typical lifecycle of a Case?

Answer 17. Each case is individualized, so the length of cases varies.

Question 18. How long are most Cases open?

Answer 18. See Answer 17.

Question 19. What action indicates that a Case is completed or closed?

Answer 19. Cases are considered closed when the customer is no longer receiving services.

Question 20. Could the Department list the systems that the Client Management System would need to integrate with?

Answer 20. The Agency uses multiple in-house developed applications and databases and systems developed and hosted by other federal (Social Security Administration) and state (Florida Accounting Information Resource (FLAIR), Agency for Health Care Administration, Economic Opportunity, etc.) to facilitate total case and financial lifecycle management. This list should not be considered definitive.

Question 21. Could the Department list the types of internal roles that would need access to the solution (Manager, Approver, Case Owner, etc.)?

Answer 21. The following is a list of roles needed in the application, but this list should not be considered definitive.

- Counselor
- Supervisor
- Technician
- Independent Counselor
- Private Provider Counselor
- Private Provider Supervisor
- Private Provider Administrator
- Administrator View
- Administrator Update
- Ticket To Work
- Administrator Access Management
- Vendor Information
- Contract Manager

- Contract Manager Supervisor
- Administrator Reporting

Question 22. Could the Department list the total size of document storage that would be needed for the solution?

Answer 22. See Answer 5.

Question 23. Does the calendaring function need to show group calendars or just calendars for an individual?

Answer 23. See Answer 5.

Question 24. What types of communications would need to be tracked in the solution (email, phone, SMS, letter)?

Answer 24. See Answer 5.

Question 25. Does the solution need to generate printable documents based on information in the Client Management System?

Answer 25. Yes

Question 26. Do external users (customers, partners, vendors) need to access the solution?

Answer 26. Yes.

Question 27. What is the anticipated number of external users that need access?

Answer 27. Depends on the solution but expected upwards of 400 vendors and all active VR clients which varies

Question 28. Does the Department expect a mobile app as part of this solution? If so, please provide the capability you are expecting to be provided in that app.

Answer 28. See Answer 5.

Question 29. Which types of mobile devices would the solution need to support (Android, Apple)?

Answer 29. See Answer 5.

Question 30. Will the Department provide a list of reports that will need to be built or migrated to the new system from existing systems? Or, an estimated count of reports would be helpful if a list is not available.

Answer 30. See Answer 5.

Question 31. What benchmarking or KPI's currently exist to evaluate the efficiency of the Department's case owners?

Answer 31. See Answer 5.

Question 32. Does the Department require a need for any Change Management for this solution?

Answer 32. See Answer 5.

Question 33. What is the preferred training method?

Answer 33. See Answer 5.

Question 34 Does the Department have existing knowledge articles? If so, what format are they stored in, e.g. Sharepoint, Word Documents, other?

Answer 34. Yes. Knowledge materials exists in Word, SharePoint, databases, PDF and other formats.

Question 35. Does the Department need existing knowledge articles migrated into new system? If so, how many?

Answer 35. See Answer 5.

Empyra

Question 36. What is your current system and why are you replacing it?

Answer 36. The current case management system used by the Division is an in-house developed application titled the Rehabilitation Information Management System (RIMS). RIMS is being replaced in an effort to modernize the division's case data collection, customer management and case data reporting processes.

Question 37. What is the format of the data – and will you be able to provide clean data for load?

Answer 37. See Answer 5.

Question 38. What is the timeline for a RFP release?

Answer 38. See Answer 5.

Question 39. How many staff will be using the system?

Answer 39. The system will need to support approximately 1,400 concurrent users.

Question 40. How many locations/agencies will be using the system?

Answer 40. The system will be deployed in 97+ offices statewide.

Question 41. Can you be more specific on your reporting needs?

Answer 41. See Answer 5.

Question 42. How many participants will be tracked in the system?

Answer 42. Approximately 40,000 active participants will be tracked in the system.

IBM Global Business Service

General Questions:

Question 43. What is your compelling business reason for making a change now?

Answer 43. The Division is looking to modernize its case data collection, customer management and case data reporting processes, and we need a system that can easily meet changing federal requirements.

Question 44. What is the anticipated budget range for this program inclusive of both software & implementation services?

Answer 44. See Answer 5.

Question 45. Has this program been approved by the board and fully funded? If not, what is the process to have this approved?

Answer 45. See answer 5.

Question 46. When do you anticipate releasing an RFP?

Answer 46. See Answer 5.

Question 47. When would you like to actually start the implementation services program to replace the existing solution?

Answer 47. There is no timeline at this time.

Question 48. Are there other competing programs taking place at the same time as the VR Client Management replacement effort that will compete for State resources? If so, what are these programs and which resources will be shared?

Answer 48. See Answer 47

Question 49. What are the incremental capabilities the State is looking to gain by changing technology platforms with this program?

Answer 49. See Answer 5.

Question 50. What will be the criteria for the programs overall success?

Answer 50. Success criteria have not been developed

Question 51. How many different sites/locations does the State have today? Is there one or two major sites? How many people per site?

Answer 51. 97+ State offices throughout the state. Office size varies from 1-2 staff to 150.

General Technology Questions:

Question 52. Do you have any multi-lingual requirements?

Answer 52. These requirements have not been set but certain forms are required to be available in multiple languages (English, Spanish, Creole).

Question 53. What type of email applications do you use today?

Answer 53. We currently use MS Outlook/Exchange.

Question 54. How do you currently share data with core partners (Dept of Economic Oppty, CareerSource of Florida, FDOE Blind Services – etc). How would you like to / anticipate share similar data in the future with these depts.?

Answer 54. See Answer 5.

Question 55. What Reporting tools do you currently have in house?

Answer 55. SQL Reporting Services, Excel, SharePoint, in-house developed applications.

Question 56. How many reports are required? Can you break them down by overall complexity?

Answer 56. See Answer 5.

Question 57. How many different workflows are used today? Please provide short descriptions for each workflow.

Answer 57. See Answer 5.

Question 58. Does the State of any audit requirements? IF so, can you please state what is expected.

Answer 58. See Answer 5.

Question 59. Does the State of a need/requirement for drafting/sending/tracking correspondence, letters, emails, or texts?

Answer 59. Yes

Question 60. Security - How is authentication done today for users?

Answer 60. Active Directory is used for authentication and custom role based security exists in the current case management application.

Question 61. Does the State have a preference for a Cloud or On-premises based solution?

Answer 61. See Answer 5.

Question 62. Does the State have a need for using or allowing individuals to access the solution (or updates on a case) via a mobile device?

Answer 62. See Answer 5.

Question 63. Does the State have a need for using or allowing individuals to access the solution (or updates on a case) via a portal?

Answer 63. Yes

Question 64. Security – including the ability to meet data security requirements for the Social Security Administration (SSA), the RSA and the Florida Agency for State Technology (AST). Please provide specific requirements that must be met as some of these agencies publish immensely broad guidance and requirements that may/may not be applicable.

Answer 64. See Answer 5.

Question 65. Reporting capabilities responsive to the WIOA requirements for RSA 911. Please provide referenced detailed RSA 911 requirements.

Answer 65. See Answer 5.

Case Management Questions:

Question 66. When referring to Grant Management, how complex are the grants and generally what type of data are you looking to store for this entity?

Answer 66. The system will need to track expenditures made against specific grants received.

Question 67. When referring to track funds spent on each service (under Case Management), is there a standard value per service or how are funds accounted for per service/task that is expended?

Answer 67. Some services do have a standard value; others do not.

Question 68. For your Case Management solution – do you have any need/requirement to track time spent on a case or a given SLA that needs to be accounted for or measured?

Answer 68. See Answer 5.

Question 69. Who/how are cases created?

Answer 69. The VR customer can be referred for services by self-referral, outside agency, school, or medical facility. Typically, a paper referral comes to the local field office (walk-in, fax, e-mail), if the form is not completely filled out, the tech or administrative secretary will then call the customer to get all of the information. After all the information is gathered the referral is then handled by administrative staff (tech or admin) and entered into RIMS to start the case process.

Question 70. Describe how the system manages cases in the field from start to finish.

Answer 70. RIMS manages every aspect of the customer's case. It contains demographic information, authorization and payment information, case notes for progress, it documents forms sent the customer. RIMS keeps track of the number of days in each case status. It keeps track of eligibility determination. Referrals for services come from templates in RIMS.

Question 71. Does the State have a need for case escalation? If so, how/when does this type of activity take place and what is expected?

Answer 71. See Answer 5.

Question 72. How are Cases assigned (or are they drawn/picked up by an agent)?

Answer 72. While there is an existing case assignment process, the requirements for a future case assignment process is yet to be defined.

Question 73. Does the State have the requirement for different case types? If so, how many different types?

Answer 73. Yes, but the requirement is not yet defined.

Question 74. What are your requirements for invoicing and billing?

Answer 74. Invoicing and billing requirements vary by service type.

Question 75. How will electronic signatures be used?

Answer 75. Requirements for electronic signature have not yet been developed for the Department of Education.

Question 76. What electronic signature technology is being used today? Will that be used in the future or should vendors proposal alternatives?

Answer 76. See Answer 75.

Data Migration & Integration Questions:

Question 77. Integration - what are the total number of integrations/interfaces for this program? Please define by functional area.

Answer 77. See Answer 5.

Question 78. Integration - for each integration/interface please indicate data volumes, frequency, and general complexity of the interface (simple, medium or complex)

Answer 78. The number/type of interface has yet to be defined.

Question 79. Data Integrations – Does the State currently have an Enterprise Service Bus or standard integration tool?

Answer 79. The Division does not currently have an Enterprise Service Bus. Data integrations are primarily achieved as custom efforts.

Question 80. Data Integration – Does the State have any attachments or document management requirements?

Answer 80. See Answer 5.

Question 81. How much data do you anticipate will be migrated to the new system? What are your archiving policies for data retention?

Answer 81. See Answer 5.

Implementation Services & Training Questions:

Question 82. Implementation Services – Does the State allow offshore resources or do all resources need to be US Citizens? As long as the vendor meets all applicable rule and laws for working in Florida (including background checks), there is no requirement that they be a US company.

Answer 82. See Answer 1.

Question 83. Implementation Services – Does the State have an anticipated/expected duration for deploying the solution?

Answer 83. See Answer 5.

Question 84. Implementation Services – Does the State have an anticipated Go Live date they are targeting?

Answer 84. See Answer 5.

Question 85. Implementation Services – Will there be a need to conduct a phased roll-out or do you anticipate a big bang approach?

Answer 85. See Answer 5.

Question 86. Implementation Services – Will the State have additional resources for this program? If so, how many? From which departments/groups? And will they be part time or full-time resources?

Answer 86. See Answer 5.

Question 87. Training - Different types of training can be utilized for different job functions. In many cases clients have their own training departments and want to minimize vendor services for this function. What is the preferred training service model the State would like to use for this program? (i.e Instructor lead, train-the-trainer, or self-guided)

Answer 87. See Answer 5.

Question 88. Training – What is the States expectation around training?

Answer 88. See Answer 5.

Question 89. Post Implementation Support - Most System Integrators provide a short period of time after deployment as a 'warrantee' period. Additional longer term, application management services can be provided. Are you looking for quotes on long term application management? If so, for how many years?

Answer 89. See Answer 5.