MONTANA DEPARTMENT OF ADMINISTRATION

Director's Office
Greg Gianforte, Governor
Misty Ann Giles, Director

doa.mt.gov
406.444.2460
doadirector@mt.gov

NOTICE OF INTENT TO AWARD

Solicitation Title/Event Name:

Solicitation Number:

Solicitation Close Date:

Notice of Intent to Award Post Date:

Issuing Contracts Officer contact information:

The State intends to award a contract to the apparent successful offeror(s) of the above-mentioned solicitation. The Notice of Intent to Award shall not be considered a binding commitment by the state.

Under the Montana Procurement Act, the State has made the relevant scoring matrix/bid tab for the above-mentioned solicitation available for public inspection. Comments from the public regarding the proposed award must be submitted to the Contracts Officer listed above within this 7-day notice period.

Apparent Successful Offeror(s)

Unsuccessful Offeror(s)

Category	Possible Points	Autocene Government Solutions, Inc.	CAPLUCK INC	CSST Software LLC	CaseWorthy, INC	Geographic Solutions, Inc.	Shah Software Inc.	The Center for Applied Management Practices	Wipfli LLP
Evaluated RFP Section	**Point Values**								
Business Specifications	**250 Points Possible**								
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	210	190	230	220	160	200	150	235
Baseline Technical Specifications	**100 Points Possible**								
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	80	61	70	74	85	60	65	90
Executive Summary	**50 Points Possible**								
Executive Level Overview	50	35	40	47	42	45	43	45	45
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**								
1.1 Client Management, Data Tracking, and Reporting	300	230	275	265	280	265	260	275	240
1.2 Reporting requirements	300	215	220	290	240	279	250	265	230
Section 2: Software	**700 Points Possible**								

Category	Possible Points	Autocene Government Solutions, Inc.	CAPLUCK INC	CSST Software LLC	CaseWorthy, INC	Geographic Solutions, Inc.	Shah Software Inc.	The Center for Applied Management Practices	Wipfli LLP
2.1 Retention, data analysis, deletion and retrieval	100	85	80	94	80	90	75	75	55
2.2 DPHHS's rights to data	50	45	45	47	40	45	43	45	35
2.3 Data format	50	45	40	48	31	45	37	35	35
2.4 Hosting options	50	38	30	45	38	42	37	40	31
2.5 System architecture	150	128	50	145	120	135	80	50	80
2.6 Custom software	50	43	35	45	42	44	0	0	0
2.7 Offeror Configurability	50	43	35	43	42	32	0	0	0
2.8 Licensing structure (Perpetual vs Subscription)	75	70	45	70	45	50	0	0	0
2.9 Third-party components	75	71	65	65	65	56	0	0	0
2.10 System access requirements	50	45	35	45	40	40	0	0	0
Section 3: Implementation Plan and Project Management	**550 Points Possible**								
3.1 Implementation plan	100	75	0	92	85	90	0	0	0
3.2 Project schedule	50	30	0	35	37	38	0	0	0
3.3 Weekly Update	50	45	0	45	43	45	0	0	0
3.4 Key personnel	50	45	0	48	38	43	0	0	0
3.5 Proposed customizations	75	65	0	70	56	60	0	0	0
3.6 Coordination with State's Information Technology Office	75	72	0	70	44	45	0	0	0
3.7 Solution Scaling	50	48	0	42	32	40	0	0	0

Category	Possible Points	Autocene Government Solutions, Inc.	CAPLUCK INC	CSST Software LLC	CaseWorthy, INC	Geographic Solutions, Inc.	Shah Software Inc.	The Center for Applied Management Practices	Wipfli LLP
3.8 Legacy Data migration	50	45	0	47	32	35	0	0	0
3.9 Firewall	50	45	0	40	31	35	0	0	0
Section 4: Training	**300 Points Possible**								
4.1 Training Options	50	47	0	40	40	43	0	0	0
4.2 Training Support	100	70	0	80	59	93	0	0	0
4.3 Training manual and documentation for System Administrator	50	45	0	45	30	44	0	0	0
System User Training	50	43	0	47	30	45	0	0	0
Train the Trainers	50	43	0	45	29	43	0	0	0
Section 5: Warranty, Maintenance and Support	**150 Points Possible**								
5.1 Maintenance and Warranty	50	45	0	36	0	45	0	0	0
5.2 System Latency	50	42	0	35	0	44	0	0	0
5.3 Service Level Agreements	50	45	0	45	0	45	0	0	0
Section 6: Offeror Qualifications	**150 Points Possible**								
References	Pass/Fail	Pass	0	Pass	0	Pass	0	0	0
Company Profile and Experience	100	85	0	95	0	95	0	0	0
Resumes	50	47	0	48	0	46	0	0	0
Proposals that do not receive a score of **80%** **(2,320)** of Points possible **(2,900)** for Technical Scoring **MAY** be	**(2,850 Points Possible * 80% = 2,280)**	**2,365.00**	1,246.00	**2,554.00**	1,985.00	**2,387.00**	1,085.00	1,045.00	1,076.00

Category	Possible Points	Autocene Government Solutions, Inc.	CAPLUCK INC	CSST Software LLC	CaseWorthy, INC	Geographic Solutions, Inc.	Shah Software Inc.	The Center for Applied Management Practices	Wipfli LLP
eliminated from further consideration.									
Section 7: Demonstrations	**580 Points Possible**								
Offeror Oral Presentation	580	515.00		545.00		430.00			
Section 8: Cost Proposal	**800 Points Possible**								
Fixed Bid Price	800	800.00		629.21		658.87			
Equal Pay	**215 Points Possible**								
Equal Pay for Montana Women	215	0.00		215.00		215.00			
Technical	**2,850.00**	**2,365.00**	**1,246.00**	**2,554.00**	**1,985.00**	**2,387.00**	**1,085.00**	**1,045.00**	**1,076.00**
Demonstration	**580.00**	515.00	0.00	545.00	0.00	430.00	0.00	0.00	0.00
Subtotal	**3,430.00**	2,880.00	1,246.00	3,099.00	1,985.00	2,817.00	1,085.00	1,045.00	1,076.00
Cost Proposal	**800.00**	800.00	0.00	629.21	0.00	658.87	0.00	0.00	0.00
Total Points	**4,230.00**	3,680.00	1,246.00	3,728.21	1,985.00	3,475.87	1,085.00	1,045.00	1,076.00
Bonus Points Possible	**215.00**	0.00	0.00	215.00	0.00	215.00	0.00	0.00	0.00
FINAL TOTAL	**4,445.00**	**3,680.00**	1,246.00	**3,943.21**	1,985.00	**3,690.87**	1,085.00	1,045.00	1,076.00

Autocene Government Solutions, Inc

Offeror (Company) Name:			

Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	**Point Values**	Score	Justification
Business Specifications	**250 Points Possible**		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	210.00	Proposed system meets out of the box requirements and description of how items would need to be configured. Would have liked to see better description about in system items. Majority required configuration on CSBG requirements but lacked detail.
Baseline Technical Specifications	**100 Points Possible**		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	80.00	Majority scored with minimal configuration. Good notes on the line listed as 3 but overall didn't provide much detail.
Executive Summary	**50 Points Possible**		
Executive Level Overview	50	35.00	Good understanding of current work capabilities but didn't describe how much customization needed to be developed. Premiere enterprise support package had limited detail. Providing 20 hours of service each month seems minimal.
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**		
1.1 Client Management, Data Tracking, and Reporting	300	230.00	Passport tool met requirements but response indicates system meets all components but didn't expand on how. Integrates with Tableau and good tracking capabilities. Description sounded like intuitive functionality.

Autocene Government Solutions, Inc

1.2 Reporting requirements	300	215.00	Lines up with organization standards and can collect data but lacks specificity on things that would need to be built. Described each element of individual characteristics and collection. Services are trackable but description was based on outcomes. Good detail but not a COTS.
Section 2: Software	**700 Points Possible**		
2.1 Retention, data analysis, deletion and retrieval	100	85.00	Unlimited storage and data retention for 3 years. Confidentiality and secure tracking was good. Has archive capabilities and configurable queries. Secure data deleted is unretrievable. Hit all the points but only at an overview. Didn't describe true functionality.
2.2 DPHHS's rights to data	50	45.00	Full ownership and definable access rights with ability to download and manipulate data for transparency. Flexible user permissions but unclear on formats for direct upload.
2.3 Data format	50	45.00	Data return with option for audit files and secure locations with retention in multiple formats.
2.4 Hosting options	50	38.00	Response indicates hosting options but other responses indication extensive configuration and design sessions. Uses AWS COTS system for client tracking but not CSBG specific. Could have been more specific about location of system.
2.5 System architecture	150	128.00	Highly interoperable with robust APIs with data transfer tools and various upload tools. Proposal showcase functionality of system and infographics were helpful. Detail indicates whole system must be configured to meet requirements
2.6 Custom software	50	43.00	Designed to be configurable with no code solution but will still need configuration.
2.7 Offeror Configurability	50	43.00	States system is module base. Modules can be added removed or changed without overhaul.
2.8 Licensing structure (Perpetual vs Subscription)	75	70.00	License based on subscription flat rate, not number of uses. Explained well how flat rate works and user seat management with simple licensing system. Software is basically built, just needs to be configured.

Autocene Government Solutions, Inc

2.9 Third-party components	75	71.00	Connects to all current State tools and resources. Answered all questions and doesn't require any 3rd party.
2.10 System access requirements	50	45.00	Can configure firewalls with few access items to be considered for web based solution. Gave consideration to the potential for network configuration.
Section 3: Implementation Plan and Project Management	**550 Points Possible**		
3.1 Implementation plan	100	75.00	Modules can adapt existing systems for DPHHS. Would have liked to see more detail on design implementation. Didn't describe how they would develop configuration process.
3.2 Project schedule	50	30.00	Did not provide a schedule but outlined timelines. System up in 90-120 days and outlined a 4 phase schedule that was aggressive but no details or visual as to how that would be achieved.
3.3 Weekly Update	50	45.00	Good initial plan in general with regular status meetings and agenda is good. Answered question but wanted more details.
3.4 Key personnel	50	45.00	Demonstrated personnel had pertinent expertise. Good org chart.
3.5 Proposed customizations	75	65.00	Configuration is for DPHHS requirements not entire system. Implies no significant customization but no explanation as to how that could be achieved.
3.6 Coordination with State's Information Technology Office	75	72.00	Can provide SOC 2 type 2 etc. Described coordination to ensure function on network. Compatibility with existing security measures is well defined.
3.7 Solution Scaling	50	48.00	Supports, from technical perspective, the scale up or down without affecting performance. Actually explained how system can scale based on capacity with continuous monitoring and load balancing.
3.8 Legacy Data migration	50	45.00	Didn't define specialized extraction tools. Good approach to ensure data integrity and transition
3.9 Firewall	50	45.00	Did address concerns thorough response regarding firewall.
Section 4: Training	**300 Points Possible**		
4.1 Training Options	50	47.00	Create detailed step by step system that was completely tailored to DPHHS. Can provide any reference or ongoing support in whatever format we need and accommodate any class size and need level. Also included dedicated customer success manager and described overall good methodology.

Autocene Government Solutions, Inc

4.2 Training Support	100	70.00	includes premiere support plan for 20 hours of service per month and describes response times for different level incidents. Provided infographic and stated they would create and provide training plan but didn't answer what that plan would be.
4.3 Training manual and documentation for System Administrator	50	45.00	Description was clear and concise but lacked how this would fit in very aggressive 90 day timeline.
System User Training	50	43.00	Thorough response. Would include tools to measure effectiveness of multifaceted training with different platforms.
Train the Trainers	50	43.00	Described actual specific train the trainer course and ongoing through their premiere support plan.
Section 5: Warranty, Maintenance and Support	**150 Points Possible**		
5.1 Maintenance and Warranty	50	45.00	Ongoing maintenance having regular software updates prioritizing and categorizing defects based on severity impact.
5.2 System Latency	50	42.00	Page load and function latency's seems high for what would be industry standard. Otherwise detailed response.
5.3 Service Level Agreements	50	45.00	Provided critical issue response time for different levels and detailed response including uptake time.
Section 6: Offeror Qualifications	**150 Points Possible**		
References	Pass/Fail	Pass	References had no work experience in this Scope
Company Profile and Experience	100	85.00	Answered all questions and provided good snapshots. Good description and experience with Government but doesn't appear they've ever developed specific CSBG system before .
Resumes	50	47.00	Provided roles, and contact information. Project team had relevant experience in Government but not necessarily experience with CSBG.
STOP HERE			
Proposals that do not receive a score of **80% (2,320)** of Points possible **(2,900)** for Technical Scoring **MAY** be eliminated from further consideration.	**(2,900 Points Possible * 80% = 2,320)**	2,365.00	

Autocene Government Solutions, Inc

Section 7: Demonstrations	580 Points Possible		
Offeror Oral Presentation	580	515.00	Good job going through the walk through and being able to go both to the administrator versus the client. Described an automated deduplication process based on multiple factors. File upload has the capacity to review against existing records. Multiple signature capabilities. Notifications and reminders can be created within the system. There wasn't anything specific to CSBG in terms of reporting so those criteria would need to be built.

Capluck

Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	**Point Values**	Score	Justification
Business Specifications	**250 Points Possible**		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	190.00	Component for integration with other data systems is listed as a 1 along with several other critical categories. Overall lots of indication of major design work. Had already connected to another States system.
Baseline Technical Specifications	**100 Points Possible**		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	61.00	Significant items with 1 and 2 with no explanation of how or why they could be addressed.
Executive Summary	**50 Points Possible**		
Executive Level Overview	50	40.00	Demonstrated experience in business area. System is directly aligned with CAA work. good overview in relation to CSBG and decent introduction to business. References to another Agency seemed like a poor oversight.
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**		
1.1 Client Management, Data Tracking, and Reporting	300	275.00	Provided good visual aids, services, case notes, etc. Client intake and built in organizational standard module. System is already in use in other States.
1.2 Reporting requirements	300	220.00	Over 500 different reports and additional at no extra cost but didn't speak specifically to CSBG reporting requirements. Section wasn't clearly identified and difficult to find/score. Poorly organized but did contain a lot of information.
Section 2: Software	**700 Points Possible**		
2.1 Retention, data analysis, deletion and retrieval	100	80.00	Retain data according to retention schedule. No storage limitations. Not as much information provided for a key section.

Capluck

2.2 DPHHS's rights to data	50	45.00	State retains full ownership with ability to export data.
2.3 Data format	50	40.00	Didn't contain a lot of information to fully answer question and lacked specificity but response indicated capability to meet requirement.
2.4 Hosting options	50	30.00	Provided minimal detail and didn't identify regions of hosting.
2.5 System architecture	150	50.00	Summary of key components does not address any of the concerns. Details were insufficient. No diagrams, images, architecture, outline, etc.
2.6 Custom software	50	35.00	API integration should have had more detail. Solution states it does not require custom systems but integrations will inherently need some. Concern about information for PAI information.
2.7 Offeror Configurability	50	35.00	Scalability and rapid configuration is listed but not described with any clear detail.
2.8 Licensing structure (Perpetual vs Subscription)	75	45.00	Subscription based licensing model but no other detail. Appears to have missed section.
2.9 Third-party components	75	65.00	None but no context, details, or explanation
2.10 System access requirements	50	35.00	Didn't address any possibilities for configuration around firewall, VPN, etc.
Section 3: Implementation Plan and Project Management	**550 Points Possible**		
3.1 Implementation plan	100		
3.2 Project schedule	50		
3.3 Weekly Update	50		
3.4 Key personnel	50		
3.5 Proposed customizations	75		
3.6 Coordination with State's Information Technology Office	75		
3.7 Solution Scaling	50		
3.8 Legacy Data migration	50		
3.9 Firewall	50		
Section 4: Training	**300 Points Possible**		
4.1 Training Options	50		

Capluck

4.2 Training Support	100		
4.3 Training manual and documentation for System Administrator	50		
System User Training	50		
Train the Trainers	50		
Section 5: Warranty, Maintenance and Support	**150 Points Possible**		
5.1 Maintenance and Warranty	50		
5.2 System Latency	50		
5.3 Service Level Agreements	50		
Section 6: Offeror Qualifications	**150 Points Possible**		
References	Pass/Fail		
Company Profile and Experience	100		
Resumes	50		

CaseWorthy

Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	**Point Values**	Score	**Justification**
Business Specifications	**250 Points Possible**		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	220.00	Majority of responses were 4 and 5 and provided explanations for all. Ability to create API. Mostly able to utilize Microsoft tools. Integration costs may be in addition to proposal.
Baseline Technical Specifications	**100 Points Possible**		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	74.00	Concerned with response if department helpdesk will provide frontline service. No ability to provide a security audit report that will be a requirement just to get an ITPR through SEC 42 indicates they will not audit unnecessary equipment associated with the system that is a NIST requirement. SAML with OKTA is identified. Integrations would be additional cost. DMO6 sets up ETL at additional cost. Don't provide level 1 help desk. State would have to provide customer service and customer is required to review and identify licenses and ensure that all licenses are decommissioned.
Executive Summary	**50 Points Possible**		
Executive Level Overview	50	42.00	Overview of similar projects and customers seems aligned with community action work but would have liked relation to CSBG. Expected this section overview to be more about solution not the business.
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**		
1.1 Client Management, Data Tracking, and Reporting	300	280.00	Mentions Microsoft fabric that requires additional licensing such as Power VII. Client based portal and updated interface look including forms, dashboard, etc. Customer can make changes without coding knowledge including forms, workflows, dashboards, rules, reduces, customization and scalability.

CaseWorthy

1.2 Reporting requirements	300	240.00	Current module supports module 4 and goes to XML format. Ability to add new service any time and supports several formats. Didn't demonstrate understanding of reporting needs beyond multiple formats.
Section 2: Software	**700 Points Possible**		
2.1 Retention, data analysis, deletion and retrieval	100	80.00	Answered overview but didn't discuss in detail. 50 gigs of storage maintained indefinitely in system is adequate for most states.
2.2 DPHHS's rights to data	50	40.00	Answered question that we retain ownership. Able to extract all data based on query tool. Mentions a data license but doesn't explain what that is.
2.3 Data format	50	31.00	Linked out to additional web information instead of explaining in narrative. Implies master service agreement retains data for 60 day but couldn't find the information. Wasn't easily organized
2.4 Hosting options	50	38.00	Describes SAS and Microsoft azure but didn't discuss details or where/who hosts Cloud services etc.
2.5 System architecture	150	120.00	Gave software diagram that was comprehensive and made simple information and diagram understandable but not actual architecture diagram. No other data.
2.6 Custom software	50	42.00	Stated that none are required and configurable to meet needs but didn't explain in any more detail.
2.7 Offeror Configurability	50	42.00	System has capability to make changes in real time ability but didn't describe how. Implies program staff would address system functionality issues.
2.8 Licensing structure (Perpetual vs Subscription)	75	45.00	Outlines subscription based solution that each user needs a license. Individual user licensing may require system coordination to manage licenses. Per named license would require State to manage users and staffing capacity that State does no poses.
2.9 Third-party components	75	65.00	Doesn't mention Microsoft licensing in this section despite referencing these components in previous responses. Lists open source software and other components.
2.10 System access requirements	50	40.00	Doesn't require access to network and does mention API but didn't go into details.

CaseWorthy

Section 3: Implementation Plan and Project Management	550 Points Possible		
3.1 Implementation plan	100	85.00	Described step by step for kickoff and implementation including weekly meetings, etc. Description seemed like it would lean heavily on DPHHS staff to coordinate and track.
3.2 Project schedule	50	37.00	Provided timeline with deliverables but overall timeline doesn't seem to demonstrate understanding of system development and level of effort/timeframe for various key stages.
3.3 Weekly Update	50	43.00	Seemed to meet minimum requirements. State would have access to management tool.
3.4 Key personnel	50	38.00	Relevant roles explained but didn't identify individual personal or their experience.
3.5 Proposed customizations	75	56.00	Baseline product does not meet needs so customization would be required to meet requirements of CSBG but customization isn't identified here.
3.6 Coordination with State's Information Technology Office	75	44.00	Doesn't describe working with IT specifically and just gives general outline of coordination.
3.7 Solution Scaling	50	32.00	Description was a general overview that mentioned scaling capability without much detail. Eluded to a potential for additional costs in described licenses fees.
3.8 Legacy Data migration	50	32.00	Solution seems to pass responsibility on to State. Data would need to be mapped to Vendor structure before it could be populated into Vendors solution.
3.9 Firewall	50	31.00	None identified but with no explanation. No indication to work with outbound traffic, VPN, web, etc.
Section 4: Training	300 Points Possible		
4.1 Training Options	50	40.00	Provided learning management system with on demand learning tools and each course has quiz to help self assess knowledge. Learning management system was good but didn't provide details or other solutions. In person is additional cost.

CaseWorthy

4.2 Training Support	100	59.00	Training plan was not provided as described on RFP with any of the details. Lists go live support and on demand via live online training. Doesn't describe or explain any significant details of access, examples, user types, etc.
4.3 Training manual and documentation for System Administrator	50	30.00	Mentions Vendor University but no further detail. No administration documents provided, listed, identified. No screenshots, examples, or documents provided.
System User Training	50	30.00	System user training plan not provided with no specifics or user roles identified. Implies State will train their own system users. end users are trained by system admins would imply burden is put on State.
Train the Trainers	50	29.00	Train the Trainer format appears to be the only services offered and doesn't seem to address how those trainers are involved, the timeframe, materials, etc. Doesn't describe how trainers at DPHHS would be trained to disseminate knowledge other than there are materials available.

CSST

Evaluated RFP Section	Point Values	Score	Justification
Business Specifications	**250 Points Possible**		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	230.00	Listed most items with ability to meet standards and provided good explanation for each. Actually described COTS specific to CSBG and out of the box compatibility.
Baseline Technical Specifications	**100 Points Possible**		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	70.00	Mostly high marks with 4s and 5s but several 2s where transitioning to the azure environment. Concern that penetration testing was additional Cost. Solution doesn't have the capability to receive and display data messages and alerts from other systems in real time which can create problem for the data integration. Doesn't allow branding or logos. No query language
Executive Summary	**50 Points Possible**		
Executive Level Overview	50	47.00	Highlighted experience and function related to CSBG and demonstrated understanding of needs specific to community action programs.
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**		
1.1 Client Management, Data Tracking, and Reporting	300	265.00	Comprehensive view that the system function specific to CSBG. Data collection and management description was detailed. could have expanded on other functionality and expecting more detail, screenshots, reference points, etc.
1.2 Reporting requirements	300	290.00	Follows standard data collection but also includes module data and formatting capabilities. Very detailed and showcased screenshots
Section 2: Software	**700 Points Possible**		

CSST

2.1 Retention, data analysis, deletion and retrieval	100	94.00	Staff can quickly enter client information, search and filter capabilities and customizable reports. High data functionality with household centric design with all data included on dashboard and configurable in report generation.
2.2 DPHHS's rights to data	50	47.00	Addressed in detail data retrieval and included API information. State retained full ownership and includes scheduled reports.
2.3 Data format	50	48.00	Gave detail for maintaining continuity of service and transition support and included data dictionary with many formats and detailed transition plan and closeout. Thorough plan for data transfer and assistance data return retained for mutually agreed upon time.
2.4 Hosting options	50	45.00	Described cloud based designed to be scalable and secure and provided location where they were physically hosted and recovery procedure. No details on DR Backup.
2.5 System architecture	150	145.00	Detailed description with infographic and identified layers of infographic that clearly described and diagramed system architecture included plug in options.
2.6 Custom software	50	45.00	Discussed CSBG functions that required no custom software with adequate explanation.
2.7 Offeror Configurability	50	43.00	System is highly flexible and supports scalability with rapid configuration. Would have liked examples and expecting details on how system would follow scaling not just human reaction capabilities.
2.8 Licensing structure (Perpetual vs Subscription)	75	70.00	Described system based licensing structure.
2.9 Third-party components	75	65.00	References multifactor authentication and addressed SSO integration but not much other detail.
2.10 System access requirements	50	45.00	Address potential network outbound considerations.
Section 3: Implementation Plan and Project Management	**550 Points Possible**		
3.1 Implementation plan	100	92.00	Implementation plan laid out different steps and detailed screenshots how to implement project with clear phases and activities. Internal project planning tool is excel spreadsheet. Support hours do not align with MT hours

3.2 Project schedule	50	35.00	clear what activities in what phase but couldn't determine if date range for phases overlap or not.
3.3 Weekly Update	50	45.00	Met requirements and listed different channels of communication
3.4 Key personnel	50	48.00	identified who would be on the project, what their skills are and how they would contribute specifically to our project. Most staff have experience in this system or community action work. Key team included and designated Montana team roles.
3.5 Proposed customizations	75	70.00	Explained no custom development, only configuration for CSBG report details
3.6 Coordination with State's Information Technology Office	75	70.00	Showed good outline to conduct initial planning meeting and have regular updates.
3.7 Solution Scaling	50	42.00	Ability to scale indicates they are human actionary to increase performance scale up or down but lacked detail. Prices are for 10 community action agencies may increase after that.
3.8 Legacy Data migration	50	47.00	Described 5 step plan for data migration that included relevant details for process and multi phase approach was very detailed.
3.9 Firewall	50	40.00	Did indicate they don't support VPN but don't indicate any other configuration.
Section 4: Training	**300 Points Possible**		
4.1 Training Options	50	40.00	Very detailed response with multiple customized options and include suite of general documents. Utilized a combination of materials and training avenues and even discusses class sizes.
4.2 Training Support	100	80.00	Launch and training team engagement process and hours listed do not align with MT. Listed extensive capabilities but information wasn't organized.
4.3 Training manual and documentation for System Administrator	50	45.00	Clearly defined training materials for each section and includes detailed library already available.
System User Training	50	47.00	Ample detail on how and when in the project, training would happen. courses available based on user types with different levels of training

CSST

Train the Trainers	50	45.00	Training delivery includes detailed approach including how, why, and when
Section 5: Warranty, Maintenance and Support	**150 Points Possible**		
5.1 Maintenance and Warranty	50	36.00	System described doesn't seem to cover a warranty period for defects and configuration or business process. No extended coverage is possible, SLAs and uptime guarantees replace actual warranty.
5.2 System Latency	50	35.00	Didn't actually provide latency or load times but provided single transaction times that seem within norm.
5.3 Service Level Agreements	50	45.00	Met requirements. Includes various options for SLAs.
Section 6: Offeror Qualifications	**150 Points Possible**		
References	Pass/Fail	Pass	
Company Profile and Experience	100	95.00	Outlined many years of Community Action agency and CSBG experience including ROMA.
Resumes	50	48.00	Included profit statements and resumes that were all directly relevant with ample experience in corresponding fields.
Section 7: Demonstrations	**580 Points Possible**		
Offeror Oral Presentation	580	545.00	Ease of use in the process flow for the intake information and being able to create households from that import or have the staff just create them on the CAA side. Deduplication and merge participant functionality when importing information onto a portfolio are good. Notification and reminders in system are extensive and easy to set up. Presentation of CSBG reporting module had everything that we really need for showing client outcomes and services and was able to list the services that linked to the outcomes. System is built specifically for CSBG reporting and functionality shows proven capability. Impressive compatibility with various file formats or media types for uploading into the system.

Geographic Solutions, Inc.

Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	**Point Values**	**Score**	**Justification**
Business Specifications	**250 Points Possible**		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	160.00	Mostly 4 or 5, however, six items were marked at two, which includes a lot of customizations. Designing the CSBG program elements outcomes, all of the reporting and PES and Annual report mod. requires modifications or track client level data specific to CSBG. This is a major deduction considering we are looking for something more off the shelf. Although in reading their proposal, the system is designed for a client intake management, so I'm unclear what exactly needs designed.
Baseline Technical Specifications	**100 Points Possible**		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	85.00	All line items marked that needed customization are CSBG specific. Seemed realistic that API's would need to be configured.
Executive Summary	**50 Points Possible**		
Executive Level Overview	50	45.00	Summary that highlights kiosks of their system data-driven analysis service tracking capabilities with the robust reports component. Key components and org standards are good with similar entities/other States. Product has not been used for CSGB before.
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**		
1.1 Client Management, Data Tracking, and Reporting	300	265.00	Narrative is comprehensive for product capability. Good tracking of clients and details. Described good user functionality with no wrong door data navigation.

Geographic Solutions, Inc.

1.2 Reporting requirements	300	279.00	Demonstrated Offeror understands needs for program but will need to be designed. System can collect all the data points that we need and they were able to list relevant NPIS. Doesn't currently have capability but can be designed, didn't explain functionality of how. Would have liked to see reports or screen shots for samples.
Section 2: Software	**700 Points Possible**		
2.1 Retention, data analysis, deletion and retrieval	100	90.00	Data entry and data retrieval was all described in great details. comprehensive description of capability and good overview of functionality as it relates to data.
2.2 DPHHS's rights to data	50	45.00	Ownership of data is with State but doesn't describe transfer or manipulation. Extensive narrative but many didn't relate to requirement.
2.3 Data format	50	45.00	Well planned transition items explain exporting in multiple modalities and included plan for transfer rather than just listing capabilities.
2.4 Hosting options	50	42.00	Separate server updates different environments and requires no hardware. Did not specify where data center is located.
2.5 System architecture	150	135.00	Comprehensive and hosts over 200 systems in their data center. Infographic seemed to address question but felt more like an overview vs a detail description. Narrative talks about shared schema and config, but then talks about multi tenant plus isolated hardware. These seem mutually exclusive.
2.6 Custom software	50	44.00	Entirely web based and supports full access. Provided a lot of information on what workspace and everything that they would need for this software.
2.7 Offeror Configurability	50	32.00	Discusses different features can be turned on and off. New client management data tracking reporting system will require less than 20% customization. No code solution. They didn't address scalability at all. They addressed modularity and additional modules, but they didn't address configurability in terms of business requirements change either. So if you had a rule change. How do they address that? Didn't address technical or business changes.
2.8 Licensing structure (Perpetual vs Subscription)	75	50.00	Indicate fixed price but didn't address licensing structure.
2.9 Third-party components	75	56.00	Provided a lot of information that didn't relate to question.

Geographic Solutions, Inc.

2.10 System access requirements	50	40.00	Discussed integrations with Sate API, etc. Didn't take into account network rules.
Section 3: Implementation Plan and Project Management	**550 Points Possible**		
3.1 Implementation plan	100	90.00	rapid implementation and development project life cycle and outlined their mechanisms, and they had an online project communication system and required traceability matrix. They had a lot of information.
3.2 Project schedule	50	38.00	Deliverables were very detailed but timing seems very aggressive with heavy administrative load. Didn't identify key dates or milestones with those deliverables.
3.3 Weekly Update	50	45.00	Described adequate communication and requirements.
3.4 Key personnel	50	43.00	Good detail to structure and large team to facilitate meeting needs. Good visual of all staff but unclear as to who held what roles in project.
3.5 Proposed customizations	75	60.00	Affirm fixed fee with modifiable product that needs to be configured to meet needs. Customizations will need to be made for interfaces as well as reporting's.
3.6 Coordination with State's Information Technology Office	75	45.00	Provided lots of information about current product is implemented in another State but doesn't relate to question about State IT offices or communication.
3.7 Solution Scaling	50	40.00	Industry centered with open architecture that allows maximum but doesn't explain how any of that would function.
3.8 Legacy Data migration	50	35.00	Describes basic plan to construct the cutover reproduction implementation and review final conversion results. Doesn't breakdown any detail of State/Contractor roles.
3.9 Firewall	50	35.00	Provided a lot of information and details but didn't address topic of firewall at all.
Section 4: Training	**300 Points Possible**		
4.1 Training Options	50	43.00	Many years of experience in web based training, including multiple methods of training, including distance learning,

Geographic Solutions, Inc.

			web-based classroom and computer based to deliver rich, multifaceted experience.
4.2 Training Support	100	93.00	Trainers will design curriculum that simulates learning and ongoing training. Includes lots of modules and training team also included.
4.3 Training manual and documentation for System Administrator	50	44.00	Showcase examples of documentation, technical manuals and guides that DPHHS can review and post to portal. Materials can be customized.
System User Training	50	45.00	Training team is included and will work with state staff on logistics and showed timeline for training. Also identified follow up points in addition to standard material and implementation.
Train the Trainers	50	43.00	Detailed explanation with time frames and milestones.
Section 5: Warranty, Maintenance and Support	**150 Points Possible**		
5.1 Maintenance and Warranty	50	45.00	Provided adequate information.
5.2 System Latency	50	44.00	Described as designed to deliver optimal performance but page load seems like the long end of industry standard. Didn't address report times.
5.3 Service Level Agreements	50	45.00	Support time is mountain time which matched DPHHS needs. Didn't see a mechanism for source tracking.
Section 6: Offeror Qualifications	**150 Points Possible**		
References	Pass/Fail	Pass	
Company Profile and Experience	100	95.00	Very through response and addressed ROMA implementation with good experience.
Resumes	50	46.00	Comprehensive response with good experience
STOP HERE			

Geographic Solutions, Inc.

Proposals that do not receive a score of **80% (2,320)** of Points possible **(2,900)** for Technical Scoring **MAY** be eliminated from further consideration.	**(2,900 Points Possible * 80% = 2,320)**		
Section 7: Demonstrations	**580 Points Possible**		
Offeror Oral Presentation	580	430.00	Introduction had a lot of details and a lot of different components. Demo was very focused on the bulleted items requested and very well organized. The client can select different things that they are looking for and configure their dashboard/notifications. Deduplication and merging processes seemed easy and the functionality where you can merge clients and merge households with the merge button based on percentage of match was helpful. Really liked the digital signature option. Mechanisms in place for a robust service tracking based on reporting requirements from other federal reporting but not specific to CSBG. Contains a lot of reports that State can choose from and some that Community Action agencies can potentially use, but Solution has not been created yet or used by any other entity. The system would need a lot of like business intelligence to develop the final working products and is not a COTS solution as specified in the RFP. May be configurable for our specific program needs but it seemed like a lot for a user to navigate and overall workflow didn't seem like it flowed as easily for user experience.

Shah Software

Evaluated RFP Section	Point Values	Score	Justification
Business Specifications	**250 Points Possible**		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	200.00	They will need development for importing customization for predictive prescriptive analytics. Solution must have ability to de duplicate or merge accounts and this will require customization
Baseline Technical Specifications	**100 Points Possible**		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	60.00	Some responses do not address critical requirements and provided no explanations. DCB 04 response indicates misunderstanding. BM01 indicates no ability to audit errors, while almost every other item is answered 5 but describes configuration required which is not a 5. SEC09 response is an AI answer and not acceptable. Many customizations described in narrative.
Executive Summary	**50 Points Possible**		
Executive Level Overview	50	43.00	Good overview and included system highlights
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**		
1.1 Client Management, Data Tracking, and Reporting	300	260.00	The client tracking reporting system seems to meet the requirements of the federal CSBG annual report. It includes the concepts of Roma next Gen. With regards to assessing applicant need, planning strategies with clients, implementing services. "Discussed in detail in later section" isn't helpful
1.2 Reporting requirements	300	250.00	Responses captures all requirements of CSBG report and has template for organizational standards that can be customized be CSBG. basic overview of functionality but not details. would have like screen shots or samples of reports.
Section 2: Software	**700 Points Possible**		

Shah Software

2.1 Retention, data analysis, deletion and retrieval	100	75.00	Exceeded page limit (28 pages of 25) Information is user friendly interface but data is only flagged as deleted. However, deletions not being excluded from system is a huge concern. Responses needed clarification on system liability.
2.2 DPHHS's rights to data	50	43.00	State retains ownership of data but did not address downloading or manipulation.
2.3 Data format	50	37.00	Relevant data can be exported in acceptable formats. Data is in excel and could be converted to CSV but extra step. No indication of planning transition services and the service support coverage post termination.
2.4 Hosting options	50	37.00	System says it's state of the art but doesn't describe anything to support. No indication the data center locations or redundancy provided.
2.5 System architecture	150	80.00	More of a description of the user experience and functionality over true architecture. Lacks specificity but does have integration with 3rd party information. Single portal for State Network Agencies. Concern that they said the state program officer would have to monitor all of the individual agencies and generate state level reports. No actual architecture diagrams. No indication of authentication methods, integration interfaces only available through API.
2.6 Custom software	50		
2.7 Offeror Configurability	50		
2.8 Licensing structure (Perpetual vs Subscription)	75		
2.9 Third-party components	75		
2.10 System access requirements	50		
Section 3: Implementation Plan and Project Management	**550 Points Possible**		
3.1 Implementation plan	100		
3.2 Project schedule	50		
3.3 Weekly Update	50		
3.4 Key personnel	50		
3.5 Proposed customizations	75		
3.6 Coordination with State's Information Technology Office	75		

Shah Software

3.7 Solution Scaling	50		
3.8 Legacy Data migration	50		
3.9 Firewall	50		
Section 4: Training	**300 Points Possible**		
4.1 Training Options	50		
4.2 Training Support	100		
4.3 Training manual and documentation for System Administrator	50		
System User Training	50		
Train the Trainers	50		
Section 5: Warranty, Maintenance and Support	**150 Points Possible**		
5.1 Maintenance and Warranty	50		
5.2 System Latency	50		
5.3 Service Level Agreements	50		
Section 6: Offeror Qualifications	**150 Points Possible**		
References	Pass/Fail		
Company Profile and Experience	100		
Resumes	50		

The Center for Applied Management Practices

Category	Possible Points	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	**Point Values**	Score	Justification
Business Specifications	**250 Points Possible**		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	150.00	Several line items below 3 don't include descriptions. Lacks ability to deduplicate and merge schedule appointments. Reminders does not include digital signatures, referrals, unique case numbers, eligibility determination or connections with other systems. Significant number of two to three level responses are required business requirements.
Baseline Technical Specifications	**100 Points Possible**		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	65.00	Significant number of requirements have no narrative. Some responses indicate additional licensing. Don't support notifications of user actions and left several line items without any explanation.
Executive Summary	**50 Points Possible**		
Executive Level Overview	50	45.00	System is specifically designed for CSBG with good overview of familiarity with needs.
Section 1: Client Management, Data Tracking, and Reporting	**600 Points Possible**		
1.1 Client Management, Data Tracking, and Reporting	300	275.00	Showed good understanding of needs and system requirements and work with relevant systems.
1.2 Reporting requirements	300	265.00	Response was difficult to follow and poorly organized to understand what sections covered what material. Reporting requirements were not clearly outlined but capabilities were implied. Dashboards can be customizable and data points can be automated to each community action agency for reporting.
Section 2: Software	**700 Points Possible**		

The Center for Applied Management Practices

2.1 Retention, data analysis, deletion and retrieval	100	75.00	Features advanced search tools and seamless growth. Customizable for data analysis and scalable with infrastructure. Narrative, not broken out into component requirements and difficult to determine response.
2.2 DPHHS's rights to data	50	45.00	State maintains full ownership and control but lacked other details.
2.3 Data format	50	35.00	Mention first export of clients is provided free of charge in agreed upon format but additional cost for any report after. No indication of transition services, planning coverage, post operational et cetera. No indication of data destruction post contract.
2.4 Hosting options	50	40.00	Uses Microsoft for cloud hosting. Couldn't find secure location physically identified.
2.5 System architecture	150	50.00	States Agency hierarchy allowing groups or networks of agencies to use the system but doesn't explain with any more detail. Didn't address architecture in any way. No diagrams, no discussion of technology, no narrative.
2.6 Custom software	50		
2.7 Offeror Configurability	50		
2.8 Licensing structure (Perpetual vs Subscription)	75		
2.9 Third-party components	75		
2.10 System access requirements	50		
Section 3: Implementation Plan and Project Management	**550 Points Possible**		
3.1 Implementation plan	100		
3.2 Project schedule	50		
3.3 Weekly Update	50		
3.4 Key personnel	50		
3.5 Proposed customizations	75		
3.6 Coordination with State's Information Technology Office	75		
3.7 Solution Scaling	50		
3.8 Legacy Data migration	50		

3.9 Firewall	50		
Section 4: Training	**300 Points Possible**		
4.1 Training Options	50		
4.2 Training Support	100		
4.3 Training manual and documentation for System Administrator	50		
System User Training	50		
Train the Trainers	50		
Section 5: Warranty, Maintenance and Support	**150 Points Possible**		
5.1 Maintenance and Warranty	50		
5.2 System Latency	50		
5.3 Service Level Agreements	50		
Section 6: Offeror Qualifications	**150 Points Possible**		
References	Pass/Fail		
Company Profile and Experience	100		
Resumes	50		

Wipfli

Business Specifications	250 Points Possible		
Offerors Response to Business Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	250	235.00	Had good explanations for meeting requirements and minimal customization.
Baseline Technical Specifications	100 Points Possible		
Offerors Response to Baseline Specifications Document: (Proposals that receive a failing score **MAY** be eliminated from further consideration.)	100	90.00	They'll engage with the state in various customizations. The use of Microsoft Power BI, Microsoft Power Pages presents a pretty steep learning curve for many. Ability to use power platform to achieve data interfaces is concerning this result additional cost post financial for licensing and PB for time to learn and execute on new platform.
Executive Summary	50 Points Possible		
Executive Level Overview	50	45.00	Technology solutions paired with human centered design is clearly described as best practices and methodologies. Local resource makes for strong partnership opportunity
Section 1: Client Management, Data Tracking, and Reporting	600 Points Possible		
1.1 Client Management, Data Tracking, and Reporting	300	240.00	System build that leverages data collection on a new platform. Good strategies for data management with robust API's and no code module. Would have liked to see more detail on client management and data tracking. Did include client Information Services, outcomes, needs, assessment module, case management module and others.
1.2 Reporting requirements	300	230.00	Can collect all reporting requirements and reports can be automated with ability for agencies to monitor their own requirements. Poorly organized response made it difficult to find answers and materials. Overall general response lacked details
Section 2: Software	700 Points Possible		

Wipfli

2.1 Retention, data analysis, deletion and retrieval	100	55.00	Proposal states they will host data on a State system that the state doesn't currently own making the solicitation unusable as proposed. Basic overview of data environment but details were lacking. Stored in State's Microsoft tenant was concerning.
2.2 DPHHS's rights to data	50	35.00	State has ownership but doesn't discuss in detail data transfer. Data is only accessed through States environment
2.3 Data format	50	35.00	Data held by DPHHS, but didn't address transition planning or access post termination. Didn't feel the question was answered based on Microsoft relationship.
2.4 Hosting options	50	31.00	Basic overview but limited details to explain solution.
2.5 System architecture	150	80.00	Utilize Microsoft platform and identify environment and configuration needs. Provides data analytics and leverage solutions overview but very little detail as to relationship with State and Microsoft Didn't actually provide any system architecture, data flow components, components, interface interactions, etcetera. Diagrams were found in subsequent dependencies, but not referenced in the narrative. While architecture provided entire system relies on infrastructure not within the capability of the state at this time and is proposed at involving dozens of people across multiple teams to procure, configure, and implement. A significant hidden PB cost to the department and coordination efforts. Outside the expected scope of the project for program staff and for project management.
2.6 Custom software	50		
2.7 Offeror Configurability	50		
2.8 Licensing structure (Perpetual vs Subscription)	75		
2.9 Third-party components	75		
2.10 System access requirements	50		
Section 3: Implementation Plan and Project Management	**550 Points Possible**		
3.1 Implementation plan	100		
3.2 Project schedule	50		

Wipfli

3.3 Weekly Update	50		
3.4 Key personnel	50		
3.5 Proposed customizations	75		
3.6 Coordination with State's Information Technology Office	75		
3.7 Solution Scaling	50		
3.8 Legacy Data migration	50		
3.9 Firewall	50		
Section 4: Training	**300 Points Possible**		
4.1 Training Options	50		
4.2 Training Support	100		
4.3 Training manual and documentation for System Administrator	50		
System User Training	50		
Train the Trainers	50		
Section 5: Warranty, Maintenance and Support	**150 Points Possible**		
5.1 Maintenance and Warranty	50		
5.2 System Latency	50		
5.3 Service Level Agreements	50		
Section 6: Offeror Qualifications	**150 Points Possible**		
References	Pass/Fail		
Company Profile and Experience	100		
Resumes	50		