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)

	Points Possible	Eccovia	Geographic Solutions	IGX Solutions	Shah Software	The Whole Group	Wipfli LLP	empowOR by CSST
CSBG DATA SYSTEM - Scoring Compilation								
Executive Summary	100	80	95	74	95	0	95	95
Client Data Tracking and Case Management System	920	638	819	396	790	0	715	733
Implementation Plan and Project Management	640	391	561	60	483	0	441	476
Training, Warranty, Maintenance and Support Option(s)	560	369	524	35	382	0	391	427
References	Pass/Fail	Pass	Pass	Pass	Pass	0	Failed	Pass
Company Profile and Experience	100	87	92	52	94	0	85	88
Resumes	100	77	95	75	65	0	90	90
Program Specific Characteristics	480	415	456	420	430	0	460	450
Baseline	200	135	190	190	119	0	190	115
Any proposal that fails to achieve eighty percent (80%) of the combined points will be eliminated from further consideration. 3,100 * 80% = 2,480	**2,480 needed of 3,100**	2,192.00	2,832.00	1,302.00	2,458.00	-	2,467.00	2,474.00
Product Demonstration	300.00	-	80.00	-	-	-	-	280.00
Cost Proposal	800.00	509.44	584.79	653.18	800.00	#DIV/0!	352.67	694.06
TOTAL POINTS:	4,200.00	2,701.44	3,496.79	1,955.18	3,258.00	#DIV/0!	2,819.67	3,448.06
Equal Pay for Montana Women	200.00	200.00	200.00	200.00	200.00	-	200.00	200.00
TOTAL POINTS PLUS BONUS:	4,400.00	2,901.44	3,696.79	2,155.18	3,458.00	-	3,019.67	3,648.06

Eccovia	Point Values	Points Assigned	Comments
Executive Summary	2.5% of points for a possible 100 points		
The executive summary should include an "executive" level overview of the proposal, emphasizing any unique aspects or strengths of the proposal, a brief description of the proposed system; including its capabilities to meet DPHHS's client data tracking and case management requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	80	Response referenced coordinated entry system, emphasis on case management, and agile. Good overview and requirements and detailed agencies but no specific mention of DPHHS or specific program needs
Section 1: Program System Requirements	**2,120 Points**		
1.1 Client Data Tracking and Case Management System	22% of points for a possible 920 points		
The Offeror must provide a detailed description of the Client Data Tracking and Case management solution or product offering. Include an overview of the hardware, software, database architecture, and components of the solution proposed to meet DPHHS's requirements.	**120 Points** Superior Response (95-100%) = 114 to 120 Good Response (75-94%) = 90 to 113 Fair Response (60-74%) = 72 to 89 Failed Response (59% or less) = 0 to 71	88	System described process that would meet screening eligibility and detail of each of platforms similar to what CSBG will be using but didn't give specifics. Lacked description of technical components unclear on how solution would apply. No detail related to hardware/software components of solutions.
The Offeror must describe in detail how the system meets traditional and current CSBG data tracking and reporting requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	72	Overview of how product would work but not how it would meet specific federal requirements for reporting data. Described dashboards and enrolment services but did not discuss CSBG annual report specifically.

The Offeror must describe how the system will support the data entry, data retrieval and data analysis need of DPHHS's program staff and the staff of DPHHS's service delivery partners.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	72	Good description of logic based eligibility and referral services and prebuilt reports but again did not relate specifically back to DPHHS or technical functionality.
The Offeror must describe what equipment will have to be purchased to support the proposed solution and provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Nothing identified that would have to be provided since it is a cloud based solution
The Offeror must describe DPHHS's rights to data and what level of control DPHHS will have over data entered in the system.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	59	Identified oversight of data and ownership as individual responsibility. Didn't describe or specify types of data retrieval or integrity for DPHHS data ownership as a whole.
The Offeror must describe the format in which data entered by DPHHS will be provided to DPHHS in the event of separation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	57	Response talked about importing data in their system but didn't provide info about file format or specify mechanism for how information would be exported.

The Offeror must describe DPHHS's hosting options.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Met requirement
The Offeror must describe whether the system is cloud based, who the cloud offeror is, and what region the cloud provider is located.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	72	Described oversight and cloud environment. Didn't identify specific type of cloud environment or more detail about the varied US regions or specific physical locations. Does have 99.9% uptime guarantee.
The Offeror must describe in detail the overall system architecture of the solution being proposed.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	50	References three tier architecture interface but didn't describe system architecture or inbound data, back end data, placemat, etc.
The Offeror must describe how the solution facilitates the use of electronic signatures.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	38	Captures client records in system and can be captured on any form including touch screen mouse, or topaz pad. Didn't discuss digital solutions such as adobe or DocuSign so it seems to predominantly rely on wet signature or on site signatures for CSBG

The Offeror must describe how the solution facilitates a paperless service provision environment.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	System works internally and notifications can be a tool in the system. Lacked detail to describe specifically meeting requirement. Response describes ability to upload documents to capture information but doesn't relate to paperless.
Total for Client Data Tracking and Case Management System	920	**638**	
1.2 Implementation Plan and Project Management	15% of points for a possible 640 points		
Provide a detailed description of the implementation plan.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	80	Described agile methodology that is preferred project tool for turnaround time and ability to identify issues more quickly. Provided an example of different plan vs what our proposed system would be. Software they use for delivery lifecycle methodology met within 1-4 weeks but didn't appear to be tailored to DPHHS.
Provide the estimated project schedule with detailed timeline and a complete description of the key activities required for the installation of the proposed system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	38	Timeline appeared to be cut and paste as provided dates were old so maybe wasn't updated according to DPHHS needs.

Criteria	Scoring	Score	Comments
Provide a description of how updates on the project will be provided to DPHHS on a weekly basis.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	Updates are delivered by virtual weekly meeting and follow up with Smartsheet. Adequate for making sure there's a collaboration with email summarizing but didn't provide examples.
Describe the project team members and other key personnel and identify the tasks both the Offeror and DPHHS will perform to successfully implement the proposed system.	**90 Points** Superior Response (95-100%) = 85 to 90 Good Response (75-94%) = 67 to 84 Fair Response (60-74%) = 54 to 66 Failed Response (59% or less) = 0 to 53	53	Described team members roles, responsibilities, and actions for each team member. Didn't specifically identify who would fill those roles or personnel for tasks as required.
Identify any equipment DPHHS needs to purchase prior to installation date. Provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Nothing identified
For solutions that will require customization to a base product to meet DPHHS's requirements a detailed estimate and description of proposed customizations and associated cost estimates on top of base costs shall be included in the proposal.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	0	Information provided in Cost Proposal but no explanation or description, narrative or details for customization or price sheet.

Describe how you will coordinate with DPHHS's Information Technology Office.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	Provided brief overview of communication updates on weekly basis, however didn't provide detail as to who would be in contact or how.
Provide a detailed plan regarding cut over from existing system to the new system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Provided sample plan example for COC and HMIS and checklist but not specific to DPHHS. Good example of tracking information but would have liked to see how checklist is met.
Describe how the proposed system will work behind DPHHS's firewall – if applicable.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	25	Stated system was web based solution so firewall is not applicable but didn't address any potential for security like outbound traffic, VPN , etc.
Describe how you will coordinate with DPHHS's Information Technology office to configure any necessary servers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	25	Expectation was to address things like data integrations but response simply statedit was a web based platform doesn't require server configuration. Web based solutions can integrate with servers so they simply didn't attempt to answer question.
Total for Implementation Plan and Project Management	640	**391**	

1.3 Training, Warranty, Maintenance and Support Option(s)	13% of points for a possible 560 points		
Provide a complete maintenance plan and warranty plan as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	They have coverage M-F and tiered 24/7 support model. Help Ticket system for support, all fairly standard but don't see pricing details.
Include initial warranty length of any and all parts, materials and labor.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	30	Deployment support hours are within scope but narrative does not discuss any support of actual warranty
Provide all system administration and end user documentation of the Client Data Tracking and Case Management system being proposed. Electronic documentation is preferred.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	60	Documents include user guide, video tutorials, and other information available. Resources are all in application help center and doesn't explore custom options or user specific needs.
The proposal must include a plan that outlines how the system users will be trained on the proposed system. Training will include sufficient information and experience to familiarize users with system and basic operation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74	60	Provided information about train the trainer and designer tool set, configuration and platform designs. Doesn't show anything about familiarizing Agency specific users with system or any details/examples.

	Failed Response (59% or less) = 0 to 59		
Provide a plan for training current staff and what training materials and methods will be used.	**60 Points** Superior Response (95-100%) = 57 to 60 Good Response (75-94%) = 45 to 56 Fair Response (60-74%) = 36 to 44 Failed Response (59% or less) = 0 to 35	36	Narrative describes admin training but not for general staff. Discusses defined overall what resources are available but doesn't include examples or supporting detail.
Describe a plan for training trainers at DPHHS to facilitate ongoing training for new and existing staff who need refreshers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	29	In system training based on bult in help center with documentation and links but doesn't address train the trainer model. Indicates frequent user training but no specific details or examples.
Provide a description of the Service Level Agreement for support and maintenance for cloud hosting in as much detail as possible. Attach copies of the agreements in place as well, or a sample of the sort of agreement that will apply to DPHHS's contract.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	80	Provided clear SLAs, support times and response times, and definitions were relevant but maintenance, hosting, and admin details were lacking.
Total for Training, Warranty, Maintenance & Support Option(s)	560	**369**	
Section 2: Offeror Qualifications	**200 Points**		

2.1 References	Pass/Fail		
Complete contact information provided.	Pass/Fail	Pass	
2.2 Company Profile and Experience	2.5% of points for a possible 100 points		
Detailed description of similar past projects, including: • Identify the primary point of contact for this proposal and for the project. Include name, email, phone number, and applicable credential information. • Identify all company office locations and total number of employees. • Identify how long the company has worked with state offices managing community action programs. • Provide the total number of active clients supported on the solution proposed. • Provide an overview of how the organization helps state offices and their community action partners to implement the CSBG Results Oriented Management and Accountability (ROMA) and how the organization has responded so far to changes that have been made to ROMA .	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	87	Experience in specific business area need is questionable as background does not seem to be in CSBG.
2.3 Resumes	2.5% of points for a possible 100 points		
Key personnel resume's, including summary of qualifications, work experience, education, and skills.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	77	Staff qualifications meet expectations but specific IT staff weren't identified.
Total for Offeror Qualifications	200	**164**	
Section 3: Technical Requirements	**680 Points**		
3.1 Project Specific Characteristics	10% of points for a possible 480 points		

Offerors Response to Attachment 1: Project Characteristics	**480 Points** Superior Response (95-100%) = 456 to 480 Good Response (75-94%) = 360 to 455 Fair Response (60-74%) = 288 to 359 Failed Response (59% or less) = 0 to 287	415	Some requirements have heavier weight in terms of needing to comply, there were several 1 and 2 responses. Any items at 3 or below indicated concerns about proprietary API structure and standardized structure to data interchange.
3.2 Baseline Requirements	5% of points for a possible 200 points		
Offerors Response to Attachment 2: Baseline Requirements	**200 Points** Superior Response (95-100%) = 190 to 200 Good Response (75-94%) = 150 to 189 Fair Response (60-74%) = 120 to 149 Failed Response (59% or less) = 0 to 119	135	Responses given to these requirements for data integrations as well as state owned system banners are required under MOM policy for State IT Policy. No custom developed software is understandable but they seem to be writing custom software

Geographic Solutions	Point Values	Points Assigned	Comments
Executive Summary	2.3% of points for a possible 100 points		
The executive summary should include an "executive" level overview of the proposal, emphasizing any unique aspects or strengths of the proposal, a brief description of the proposed system; including its capabilities to meet DPHHS's client data tracking and case management requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	Good details and description but questioned so many references to AI
Section 1: Program System Requirements	**2,120 Points**		
1.1 Client Data Tracking and Case Management System	22% of points for a possible 920 points		
The Offeror must provide a detailed description of the Client Data Tracking and Case management solution or product offering. Include an overview of the hardware, software, database architecture, and components of the solution proposed to meet DPHHS's requirements.	**120 Points** Superior Response (95-100%) = 114 to 120 Good Response (75-94%) = 90 to 113 Fair Response (60-74%) = 72 to 89 Failed Response	115	Specific information on data management and web based application was detailed. Excellent detail related to configuration and hardware and no wrong door approach.

	(59% or less) = 0 to 71		
The Offeror must describe in detail how the system meets traditional and current CSBG data tracking and reporting requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	85	Good attention to detail and reports can be run through tool but lacked examples for reports specific to CSBG.
The Offeror must describe how the system will support the data entry, data retrieval and data analysis need of DPHHS's program staff and the staff of DPHHS's service delivery partners.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response	90	Response provided background demographics and dashboards specific to unique needs of CSBG. Made it clear on how system will work but could use more info on how data will be extracted.

	(59% or less) = 0 to 59		
The Offeror must describe what equipment will have to be purchased to support the proposed solution and provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Clear that no equipment was needed and provided justification
The Offeror must describe DPHHS's rights to data and what level of control DPHHS will have over data entered in the system.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response	85	Data administrators use role based permissions and described how data is stored but no specifics about rights to system

	(59% or less) = 0 to 59		
The Offeror must describe the format in which data entered by DPHHS will be provided to DPHHS in the event of separation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	88	Response acknowledges a role in the transition plan and defines support for those responsibilities. System will extract data from legacy system but no details on format transition.
The Offeror must describe DPHHS's hosting options.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response	48	Described hosting environments and explanation of circumstances of hosting. Highlighted life cycle and need for multiple environments and even specific hardware different environments and gave good detail and fiberoptics communications.

	(59% or less) = 0 to 29		
The Offeror must describe whether the system is cloud based, who the cloud offeror is, and what region the cloud provider is located.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	80	Response was not specific on cloud requirements vs self hosting. Didn't provide regions but had architectural diagrams.
The Offeror must describe in detail the overall system architecture of the solution being proposed.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response	95	Good detail of shared database level, client load balancers, and multiple layers of system and a good graphic for explanation.

	(59% or less) = 0 to 59		
The Offeror must describe how the solution facilitates the use of electronic signatures.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Good information, description and visuals for signature pad, and remote signature options but didn't describe traditional signature tools such as DocuSign or Adobe Signature.
The Offeror must describe how the solution facilitates a paperless service provision environment.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response	43	Describes various media file types can be uploaded and managed functions to index tag, store and retrieve, documents. Didn't address notifications, email, etc.

	(59% or less) = 0 to 29		
Total for Client Data Tracking and Case Management System	920	**819**	
1.2 Implementation Plan and Project Management	15% of points for a possible 640 points		
Provide a detailed description of the implementation plan.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	Narrative had good information about rapid implementation and development. Very clear on methodology on elements and phases.

Provide the estimated project schedule with detailed timeline and a complete description of the key activities required for the installation of the proposed system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	48	Really detailed timeline including each phase of deliverables.
Provide a description of how updates on the project will be provided to DPHHS on a weekly basis.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	48	Very descriptive regarding meetings, emails, and who will be communication and hits all expected strategies

Describe the project team members and other key personnel and identify the tasks both the Offeror and DPHHS will perform to successfully implement the proposed system.	**90 Points** Superior Response (95-100%) = 85 to 90 Good Response (75-94%) = 67 to 84 Fair Response (60-74%) = 54 to 66 Failed Response (59% or less) = 0 to 53	85	Described, experienced personal in relevant projects, identified organizations and roles, and provided a visual of team management. Project team is heavy and full of leads so might be overrepresented.
Identify any equipment DPHHS needs to purchase prior to installation date. Provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	47	Justified why they didn't need extra equipment.

For solutions that will require customization to a base product to meet DPHHS's requirements a detailed estimate and description of proposed customizations and associated cost estimates on top of base costs shall be included in the proposal.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	94	Detailed analysis in specific areas such as for tracking and case management and identified a number of items they may need to focus on that would need additional customization.
Describe how you will coordinate with DPHHS's Information Technology Office.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	States they leave it up to our discretion and discusses ensure proper coordination but didn't explain how or go into detail.

	50 Points		
Provide a detailed plan regarding cut over from existing system to the new system.	Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	48	Plan calls out to identify errors and audit reports and included checklists with specific times and procedures to meet dates.
Describe how the proposed system will work behind DPHHS's firewall – if applicable.	50 Points Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	36	Stated they will not need firewall and gave reasoning but gave no security considerations for outbound traffic, VPN , et.

Describe how you will coordinate with DPHHS's Information Technology office to configure any necessary servers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	20	Response was only briefly addressed in previous response.
Total for Implementation Plan and Project Management	640	**561**	
1.3 Training, Warranty, Maintenance and Support Option(s)	13% of points for a possible 560 points		
Provide a complete maintenance plan and warranty plan as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	94	Very detailed description of maintenance support but didn't see cost breakdowns.

	50 Points Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29		
Include initial warranty length of any and all parts, materials and labor.		45	Response indicates provided warrantee but no specifics details.
	100 Points Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59		
Provide all system administration and end user documentation of the Client Data Tracking and Case Management system being proposed. Electronic documentation is preferred.		90	Highlighted all manuals and materials will be provided in electronic format. Expected to see examples since this would be easy to demonstrate.

The proposal must include a plan that outlines how the system users will be trained on the proposed system. Training will include sufficient information and experience to familiarize users with system and basic operation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	Provided training in classroom or computer lab, class size not to exceed 25 included adult learning methods and multiple methods
Provide a plan for training current staff and what training materials and methods will be used.	**60 Points** Superior Response (95-100%) = 57 to 60 Good Response (75-94%) = 45 to 56 Fair Response (60-74%) = 36 to 44 Failed Response (59% or less) = 0 to 35	57	Plan includes multiple modes and training sites, detailed plan and identified audiences.

Describe a plan for training trainers at DPHHS to facilitate ongoing training for new and existing staff who need refreshers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	48	Included post training resources, multiple methods and how to use curriculum and customizable to meet needs.
Provide a description of the Service Level Agreement for support and maintenance for cloud hosting in as much detail as possible. Attach copies of the agreements in place as well, or a sample of the sort of agreement that will apply to DPHHS's contract.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	SLAs and definitions were clearly outlined and incident severity levels described. Acknowledged the service level agreement was part of Contract.
Total for Training, Warranty, Maintenance & Support Option(s)	560	**524**	
Section 2: Offeror Qualifications	**200 Points**		
2.1 References	Pass/Fail		
Complete contact information provided.	Pass/Fail	Pass	

2.2 Company Profile and Experience	2.5% of points for a possible 100 points		
Detailed description of similar past projects, including: • Identify the primary point of contact for this proposal and for the project. Include name, email, phone number, and applicable credential information. • Identify all company office locations and total number of employees. • Identify how long the company has worked with state offices managing community action programs. • Provide the total number of active clients supported on the solution proposed. • Provide an overview of how the organization helps state offices and their community action partners to implement the CSBG Results Oriented Management and Accountability (ROMA) and how the organization has responded so far to changes that have been made to ROMA .	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	92	Good job of detailing main points and expertise but isn't specific to CSBG or DPHHS.
2.3 Resumes	2.5% of points for a possible 100 points		
Key personnel resume's, including summary of qualifications, work experience, education, and skills.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed	95	Resumes are relevant and had complete details and experience.

	Response (59% or less) = 0 to 59		
Total for Offeror Qualifications	200	**187**	
Section 3: Technical Requirements	**680 Points**		
3.1 Project Specific Characteristics	10% of points for a possible 480 points		
Offerors Response to Attachment 1: Project Characteristics	**480 Points** Superior Response (95-100%) = 456 to 480 Good Response (75-94%) = 360 to 455 Fair Response (60-74%) = 288 to 359 Failed Response (59% or less) = 0 to 287	456	Provided good descriptions in comment and notes but concerned about everything being 4/5 on a customizable solution. Response indicates out of the box it does everything without customization. Level of detail merits a superior response.
3.2 Baseline Requirements	5% of points for a possible 200 points		

Offerors Response to Attachment 2: Baseline Requirements	**200 Points** Superior Response (95-100%) = 190 to 200 Good Response (75-94%) = 150 to 189 Fair Response (60-74%) = 120 to 149 Failed Response (59% or less) = 0 to 119	190	Detailed responses but nearly all items were 4/5 and that seems unlikely given the type of solution. Acknowledged in response where there were 3s with good explanation of interfaces and realistic functionality.
Total for Technical Specifications	680	**646**	
STOP HERE: Part 1 Complete			
Any proposal that fails to achieve eighty percent (80%) of the combined points will be eliminated from further consideration.	3,100 * 80% = 2,480	**2,832**	

IGX Solutions	Point Values	Points Assigned	Comments
Executive Summary	2.3% of points for a possible 100 points		
The executive summary should include an "executive" level overview of the proposal, emphasizing any unique aspects or strengths of the proposal, a brief description of the proposed system; including its capabilities to meet DPHHS's client data tracking and case management requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	Shared aspect of product that are unique to system needs but seemed copy and paste for any solution. Didn't discuss anything about CSBG or national standards
Section 1: Program System Requirements	**2,120 Points**		
1.1 Client Data Tracking and Case Management System	22% of points for a possible 920 points		
The Offeror must provide a detailed description of the Client Data Tracking and Case management solution or product offering. Include an overview of the hardware, software, database architecture, and components of the solution proposed to meet DPHHS's requirements.	**120 Points** Superior Response (95-100%) = 114 to 120 Good Response (75-94%) = 90 to 113 Fair Response (60-74%) = 72 to 89 Failed Response (59% or less) = 0 to 71	72	Had basic info about uploading images but not a lot of description. Lacked details on key points and didn't really describe the system. Didn't mention CSBG. Hard to decipher where section starts or stops.

The Offeror must describe in detail how the system meets traditional and current CSBG data tracking and reporting requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	65		List relevant components but nothing specific to CSBG like tracking of outcomes or necessary reporting or documentation.
The Offeror must describe how the system will support the data entry, data retrieval and data analysis need of DPHHS's program staff and the staff of DPHHS's service delivery partners.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	55		Indicates enterprise reporting tool can connect to legacy systems and use of report builder to create queries. Lacking specificity and wasn't specific to CSBG
The Offeror must describe what equipment will have to be purchased to support the proposed solution and provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response	0		Not addressed

	(59% or less) = 0 to 29		
The Offeror must describe DPHHS's rights to data and what level of control DPHHS will have over data entered in the system.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	0	Mentioned based on roles and access but not specific.
The Offeror must describe the format in which data entered by DPHHS will be provided to DPHHS in the event of separation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	0	Not addressed

The Offeror must describe DPHHS's hosting options.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Database exists on secure virtual network. Utilizes azure.
The Offeror must describe whether the system is cloud based, who the cloud offeror is, and what region the cloud provider is located.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	Cloud system hosting and security described as Gov Cloud. Backup locations referenced but primary location not identified.
The Offeror must describe in detail the overall system architecture of the solution being proposed.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response	85	Provided an infographic that described system structure. Data included behind firewall and multiple department and agencies that work independently.

	(59% or less) = 0 to 59		
The Offeror must describe how the solution facilitates the use of electronic signatures.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Eluded to functionality that signatures are available within the system and allows wet ink signatures but didn't give any description or detail.
The Offeror must describe how the solution facilitates a paperless service provision environment.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Electronic application and document upload mentioned but not document storage or anything to do with paperless.
Total for Client Data Tracking and Case Management System	920	**396**	
1.2 Implementation Plan and Project Management	15% of points for a possible 640 points		

Provide a detailed description of the implementation plan.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	60	Mentions phases of kickoff meetings and milestones for configuration, but no details or timelines.
Provide the estimated project schedule with detailed timeline and a complete description of the key activities required for the installation of the proposed system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Not addressed
Provide a description of how updates on the project will be provided to DPHHS on a weekly basis.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Not addressed

Describe the project team members and other key personnel and identify the tasks both the Offeror and DPHHS will perform to successfully implement the proposed system.	**90 Points** Superior Response (95-100%) = 85 to 90 Good Response (75-94%) = 67 to 84 Fair Response (60-74%) = 54 to 66 Failed Response (59% or less) = 0 to 53	0	Not addressed
Identify any equipment DPHHS needs to purchase prior to installation date. Provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Not addressed
For solutions that will require customization to a base product to meet DPHHS's requirements a detailed estimate and description of proposed customizations and associated cost estimates on top of base costs shall be included in the proposal.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response	0	System configuration medel provides flexibilyt but doesn't discuss cost. No mention of CSBG workflows.

	(59% or less) = 0 to 59		
Describe how you will coordinate with DPHHS's Information Technology Office.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Not addressed
Provide a detailed plan regarding cut over from existing system to the new system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Not addressed
Describe how the proposed system will work behind DPHHS's firewall – if applicable.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47	0	Not addressed

	Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29		
Describe how you will coordinate with DPHHS's Information Technology office to configure any necessary servers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Not addressed
Total for Implementation Plan and Project Management	640	**60**	
1.3 Training, Warranty, Maintenance and Support Option(s)	13% of points for a possible 560 points		
Provide a complete maintenance plan and warranty plan as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	0	Not addressed

Include initial warranty length of any and all parts, materials and labor.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Not addressed
Provide all system administration and end user documentation of the Client Data Tracking and Case Management system being proposed. Electronic documentation is preferred.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	35	Not addressed
The proposal must include a plan that outlines how the system users will be trained on the proposed system. Training will include sufficient information and experience to familiarize users with system and basic operation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response	0	Basic explination of concepts and how their system functions. States they work with customer to create training plan but doesn't include any actual training plan.

	(59% or less) = 0 to 59		
Provide a plan for training current staff and what training materials and methods will be used.	**60 Points** Superior Response (95-100%) = 57 to 60 Good Response (75-94%) = 45 to 56 Fair Response (60-74%) = 36 to 44 Failed Response (59% or less) = 0 to 35	0	States they would have training designed at later date
Describe a plan for training trainers at DPHHS to facilitate ongoing training for new and existing staff who need refreshers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	0	Mention developing training but no existing
Provide a description of the Service Level Agreement for support and maintenance for cloud hosting in as much detail as possible. Attach copies of the agreements in place as well, or a sample of the sort of agreement that will apply to DPHHS's contract.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to	0	Did not provide

	94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59		
Total for Training, Warranty, Maintenance & Support Option(s)	560	**35**	
Section 2: Offeror Qualifications	**200 Points**		
2.1 References	Pass/Fail		
Complete contact information provided.	Pass/Fail	Pass	references didn't come from company's themselves
2.2 Company Profile and Experience	2.5% of points for a possible 100 points		
Detailed description of similar past projects, including: • Identify the primary point of contact for this proposal and for the project. Include name, email, phone number, and applicable credential information. • Identify all company office locations and total number of employees. • Identify how long the company has worked with state offices managing community action programs. • Provide the total number of active clients supported on the solution proposed. • Provide an overview of how the organization helps state offices and their community action partners to implement the CSBG Results Oriented Management and Accountability (ROMA) and how the organization has responded so far to changes that have been made to ROMA .	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	52	Didn't discuss how many years they've worked in field. Mentions primary contact but didn't discuss exericene of active team members.
2.3 Resumes	2.5% of points for a possible 100 points		

Key personnel resume's, including summary of qualifications, work experience, education, and skills.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	75	Resumes provided looked sufficient with relevent work
Total for Offeror Qualifications	200	**127**	
Section 3: Technical Requirements	**680 Points**		
3.1 Project Specific Characteristics	10% of points for a possible 480 points		
Offerors Response to Attachment 1: Project Characteristics	**480 Points** Superior Response (95-100%) = 456 to 480 Good Response (75-94%) = 360 to 455 Fair Response (60-74%) = 288 to 359 Failed Response (59% or less) = 0 to 287	420	Data integration and ETL wasn't a very strong explanation
3.2 Baseline Requirements	5% of points for a possible 200 points		

Offerors Response to Attachment 2: Baseline Requirements	**200 Points** Superior Response (95-100%) = 190 to 200 Good Response (75-94%) = 150 to 189 Fair Response (60-74%) = 120 to 149 Failed Response (59% or less) = 0 to 119	190	Role access can be configured down to field level.
Total for Technical Specifications	680	**610**	
STOP HERE: Part 1 Complete			
Any proposal that fails to achieve eighty percent (80%) of the combined points will be eliminated from further consideration.	3,100 * 80% = 2,480	**1,302**	

Shah Software	Point Values	Points Assigned	Comments
Executive Summary	2.3% of points for a possible 100 points		
The executive summary should include an "executive" level overview of the proposal, emphasizing any unique aspects or strengths of the proposal, a brief description of the proposed system; including its capabilities to meet DPHHS's client data tracking and case management requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	25 plus years in similar arena. Solution is used in 6 other states and relevant to CSBG and clients of similar field and organization standards.
Section 1: Program System Requirements	**2,120 Points**		
1.1 Client Data Tracking and Case Management System	22% of points for a possible 920 points		
The Offeror must provide a detailed description of the Client Data Tracking and Case management solution or product offering. Include an overview of the hardware, software, database architecture, and components of the solution proposed to meet DPHHS's requirements.	**120 Points** Superior Response (95-100%) = 114 to 120 Good Response (75-94%) = 90 to 113 Fair Response (60-74%) = 72 to 89 Failed Response (59% or less) = 0 to 71	113	Comprehensive and complete scope that aligns with community action organizations needs. Has centralized client intake structure. Difficult to track narrative but screenshots were helpful.
The Offeror must describe in detail how the system meets traditional and current CSBG data tracking and reporting requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response	92	Response included service and outcome tracking, reporting capabilities and federal report functionality relates to CSBG needs

	(59% or less) = 0 to 59		
The Offeror must describe how the system will support the data entry, data retrieval and data analysis need of DPHHS's program staff and the staff of DPHHS's service delivery partners.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	85	List three modules they provide and key components of flexible system for organizing. Capabilities describe what we're looking for state reporting and interface is user friendly
The Offeror must describe what equipment will have to be purchased to support the proposed solution and provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	None identified
The Offeror must describe DPHHS's rights to data and what level of control DPHHS will have over data entered in the system.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	Outlines provide full ownership. Role based permissions and partners can edit. include high standards of security and privacy.

The Offeror must describe the format in which data entered by DPHHS will be provided to DPHHS in the event of separation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	94	Described standardized formats in excel or in csv but could have seen more detail as how that process would take place.
The Offeror must describe DPHHS's hosting options.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	Clearly describes how system is hosted on venture technology and database server. Hosting source response isn't really cloud hosting. Some lack in scalability.
The Offeror must describe whether the system is cloud based, who the cloud offeror is, and what region the cloud provider is located.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	75	Information about hosting is conflicting. Identifies two separate hosts. Is data recoverable if one data center is wiped?

The Offeror must describe in detail the overall system architecture of the solution being proposed.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	Comprehensive description is clear and easy to understand without being too technical. Fair narrative but no architectural diagrams or illustrations.
The Offeror must describe how the solution facilitates the use of electronic signatures.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	37	Provided checkbox and statement to indicate signature and included screenshots of their individual capabilities but didn't explain integration capabilities with enterprise level or wet signatures.
The Offeror must describe how the solution facilitates a paperless service provision environment.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	Demonstrational functionality with scanning docs and document management but doesn't describe actual system capabilities in relation to our system.
Total for Client Data Tracking and Case Management System	920	**790**	
1.2 Implementation Plan and Project Management	15% of points for a possible 640 points		

Provide a detailed description of the implementation plan.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	Train and go live phases were clear but some administrative pieces are missing from beginning of project and a lot of considerations that aren't included.
Provide the estimated project schedule with detailed timeline and a complete description of the key activities required for the installation of the proposed system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Turn key implementation and timeline shows aggressive progress but not specific dates, jus weeks between benchmarks. Training requirement doesn't seem in line with aggressiveness of schedule. realistic
Provide a description of how updates on the project will be provided to DPHHS on a weekly basis.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Would like to see more comprehensive plan. Verbal updates identified don't seem effective and more frequent meetings with more mediums of communication is needed. Gant chart provided is outdated and needed to see a better description of responsibilities in meetings.

Describe the project team members and other key personnel and identify the tasks both the Offeror and DPHHS will perform to successfully implement the proposed system.	**90 Points** Superior Response (95-100%) = 85 to 90 Good Response (75-94%) = 67 to 84 Fair Response (60-74%) = 54 to 66 Failed Response (59% or less) = 0 to 53	82	Architect database and project coordinator were clearly identified and roles of each member responsibility outlined. Seems heavy on project coordinators. CEO is project manager, how does that work on this scope and scale .
Identify any equipment DPHHS needs to purchase prior to installation date. Provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	No none identified
For solutions that will require customization to a base product to meet DPHHS's requirements a detailed estimate and description of proposed customizations and associated cost estimates on top of base costs shall be included in the proposal.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	70	Provided hourly rates for customization and rates are reasonable for current trends. However, didn't explain the need for customizations or any detail on what might be required.
Describe how you will coordinate with DPHHS's Information Technology Office.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47	40	Answer was just working closely with team and email communication. Email is a concerning catch all answer.

	Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29		
Provide a detailed plan regarding cut over from existing system to the new system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	37	Phase transition system outlined but would like to see more technical details.
Describe how the proposed system will work behind DPHHS's firewall – if applicable.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Stated hosing system so doesn't need firewall but no security considerations for outbound traffic, VPN , etc.
Describe how you will coordinate with DPHHS's Information Technology office to configure any necessary servers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	30	Simply responded with answer above

Total for Implementation Plan and Project Management	640	**483**	
1.3 Training, Warranty, Maintenance and Support Option(s)	13% of points for a possible 560 points		
Provide a complete maintenance plan and warranty plan as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	85	Provided functions as intended and pricing difference for level of support. Listed support hours for central time zone and included response time. Attached example of license agreement, but hard to track how it would relate.
Include initial warranty length of any and all parts, materials and labor.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	25	Warrant software and sample license agreement mentioned but couldn't find details.
Provide all system administration and end user documentation of the Client Data Tracking and Case Management system being proposed. Electronic documentation is preferred.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	Provides ops manual and user manual in pdf and can be downloaded but gave little description other than just providing a pdf.

The proposal must include a plan that outlines how the system users will be trained on the proposed system. Training will include sufficient information and experience to familiarize users with system and basic operation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	65	Talked about different methods for trainings to be provided but didn't include an actual plan.
Provide a plan for training current staff and what training materials and methods will be used.	**60 Points** Superior Response (95-100%) = 57 to 60 Good Response (75-94%) = 45 to 56 Fair Response (60-74%) = 36 to 44 Failed Response (59% or less) = 0 to 35	44	Multiple modes provided but no delivery described or actual plan.
Describe a plan for training trainers at DPHHS to facilitate ongoing training for new and existing staff who need refreshers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	34	Materials and methods provided but no specifics and didn't discuss training trainers or philosophy/approach.
Provide a description of the Service Level Agreement for support and maintenance for cloud hosting in as much detail as possible. Attach copies of the agreements in place as well, or a sample of the sort of agreement that will apply to DPHHS's contract.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94	55	Stated up time allows 87 hours per year and minimal industry standard 99.9 SLA and severity of

	Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59		general conditions mirror server.
Total for Training, Warranty, Maintenance & Support Option(s)	560	**382**	
Section 2: Offeror Qualifications	**200 Points**		
2.1 References	Pass/Fail		
Complete contact information provided.	Pass/Fail	Pass	
2.2 Company Profile and Experience	2.5% of points for a possible 100 points		
Detailed description of similar past projects, including: • Identify the primary point of contact for this proposal and for the project. Include name, email, phone number, and applicable credential information. • Identify all company office locations and total number of employees. • Identify how long the company has worked with state offices managing community action programs. • Provide the total number of active clients supported on the solution proposed. • Provide an overview of how the organization helps state offices and their community action partners to implement the CSBG Results Oriented Management and Accountability (ROMA) and how the organization has responded so far to changes that have been made to ROMA .	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	94	Provided screenshots and relevant examples. Information about roam and next gen compliance and info on efficiency and integration.
2.3 Resumes	2.5% of points for a possible 100 points		

Key personnel resume's, including summary of qualifications, work experience, education, and skills.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	65	Only one resume provided and then a brief description of other staff with brief descriptions.
Total for Offeror Qualifications	200	**159**	
Section 3: Technical Requirements	**680 Points**		
3.1 Project Specific Characteristics	10% of points for a possible 480 points		
Offerors Response to Attachment 1: Project Characteristics	**480 Points** Superior Response (95-100%) = 456 to 480 Good Response (75-94%) = 360 to 455 Fair Response (60-74%) = 288 to 359 Failed Response (59% or less) = 0 to 287	430	Some responses where things we'd need to consider or make adjustments may be red flags in specifying custom development that shouldn't happen on a cots product
3.2 Baseline Requirements	5% of points for a possible 200 points		
Offerors Response to Attachment 2: Baseline Requirements	**200 Points** Superior Response (95-100%) = 190 to 200 Good Response (75-94%) = 150 to 189 Fair Response (60-74%) = 120 to 149 Failed Response	119	Big red flags such as not complying with SSO. Stating only data for enterprise data system, nothing else can be migrated. No custom branding or audit data trails.

	(59% or less) = 0 to 119		
Total for Technical Specifications	680	**549**	
STOP HERE: Part 1 Complete			
Any proposal that fails to achieve eighty percent (80%) of the combined points will be eliminated from further consideration.	3,100 * 80% = 2,480	**2,458**	

Wipfli LLP	Point Values	Points Assigned	Comments
Executive Summary	2.3% of points for a possible 100 points		
The executive summary should include an "executive" level overview of the proposal, emphasizing any unique aspects or strengths of the proposal, a brief description of the proposed system; including its capabilities to meet DPHHS's client data tracking and case management requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	Local presence in MT and endorsed vendor with community action partnership. Over 250 CSBG funded nationwide that spoke specifically to business case needs.
Section 1: Program System Requirements	**2,120 Points**		
1.1 Client Data Tracking and Case Management System	22% of points for a possible 920 points		
The Offeror must provide a detailed description of the Client Data Tracking and Case management solution or product offering. Include an overview of the hardware, software, database architecture, and components of the solution proposed to meet DPHHS's requirements.	**120 Points** Superior Response (95-100%) = 114 to 120 Good Response (75-94%) = 90 to 113 Fair Response (60-74%) = 72 to 89 Failed Response (59% or less) = 0 to 71	95	Flexible approach to system and implemented successfully on other community action networks. Good overview of different functionality in cloud based system and suite of services matches DPHHS needs. Had questions/needed more detail on Microsoft product licensing.

The Offeror must describe in detail how the system meets traditional and current CSBG data tracking and reporting requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	Discussed client and non client when outcomes are archived Exceptional business case examples within CSBG and provided distinctive reports showed Vendor is familiar with CSBG reporting needs and provided examples as to how they could meet those needs.
The Offeror must describe how the system will support the data entry, data retrieval and data analysis need of DPHHS's program staff and the staff of DPHHS's service delivery partners.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	90	Demonstrated partners and subrecipients both manual and automated systems for API. Did not discuss data retrieval or analysis
The Offeror must describe what equipment will have to be purchased to support the proposed solution and provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	Stated no hardware required but made frequent references to licenses in Microsoft environment that may not be included.

The Offeror must describe DPHHS's rights to data and what level of control DPHHS will have over data entered in the system.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	60	Made clear how data is stored, where, and how it's retrieved. Refers to azure environments and data that associated M365 licensing.
The Offeror must describe the format in which data entered by DPHHS will be provided to DPHHS in the event of separation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	85	Describes user can request database copies at pace of choosing and described how full database copy will be stored. Didn't discus file types and missing details leaving concerns about additional licensing cost.
The Offeror must describe DPHHS's hosting options.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	25	Provided description of environment but not specific to DPHHS and doesn't describe hosting items, just general details about azure.

The Offeror must describe whether the system is cloud based, who the cloud offeror is, and what region the cloud provider is located.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	65	Mentions cloud in the US but no specifics such as Gov cloud, commercial fed ramp, etc.
The Offeror must describe in detail the overall system architecture of the solution being proposed.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	85	Full narrative response was in attached documents and difficult to find/follow.
The Offeror must describe how the solution facilitates the use of electronic signatures.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	40	Signature capture isn't described and again relies on Microsoft environment. Alludes to functionality but doesn't explain how they will utilize for our solution purposes with Microsoft SharePoint, DocuSign, or adobe sign.

The Offeror must describe how the solution facilitates a paperless service provision environment.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Describes no integration with outside data required. All native to this solution. Doesn't address document upload, storage, management, etc.
Total for Client Data Tracking and Case Management System	920	**715**	
1.2 Implementation Plan and Project Management	15% of points for a possible 640 points		
Provide a detailed description of the implementation plan.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	75	Included lots of draft examples of project plans and covers roles and responsibilities for deliverables but couldn't find full narrative.
Provide the estimated project schedule with detailed timeline and a complete description of the key activities required for the installation of the proposed system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47	40	Information is scattered and doesn't show ability to communicate well. Found examples in appendix which outline updates every 2 weeks and no further detail.

	Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29		
Provide a description of how updates on the project will be provided to DPHHS on a weekly basis.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Agile methodology is typical timeline and updating descriptions and schedule. Mentions types of meetings but not much detail.
Describe the project team members and other key personnel and identify the tasks both the Offeror and DPHHS will perform to successfully implement the proposed system.	**90 Points** Superior Response (95-100%) = 85 to 90 Good Response (75-94%) = 67 to 84 Fair Response (60-74%) = 54 to 66 Failed Response (59% or less) = 0 to 53	54	General responsibilities and included estimated hours for DPHHS roles as well as listing key members. Information was present but poorly organized.
Identify any equipment DPHHS needs to purchase prior to installation date. Provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47	25	Dataverse environment and access needs require provisioning but didn't account for additional licensing costs. Not clear on how this is to be implemented or what might be needed for administrative licensing costs.

	Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29		
For solutions that will require customization to a base product to meet DPHHS's requirements a detailed estimate and description of proposed customizations and associated cost estimates on top of base costs shall be included in the proposal.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	59	Proposal includes all customizations required but then breaks out price without providing narrative to explain so remained confusing.
Describe how you will coordinate with DPHHS's Information Technology Office.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Part of core team listed but refers back to roles and responsibilities so lacked detail.
Provide a detailed plan regarding cut over from existing system to the new system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47	29	Provided infographic picture but no details. Talked about creating a cut over plan but didn't provide one

	Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29		
Describe how the proposed system will work behind DPHHS's firewall – if applicable.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	47	Described utilizing Microsoft systems that are in compliance with States requirements but not provided. Gave no security considerations for outbound traffic, VPN , etc.
Describe how you will coordinate with DPHHS's Information Technology office to configure any necessary servers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	32	Minimal narrative to support timeline and coordination of services/licenses.
Total for Implementation Plan and Project Management	640	**441**	
1.3 Training, Warranty, Maintenance and Support Option(s)	13% of points for a possible 560 points		

Provide a complete maintenance plan and warranty plan as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	65	Provided support and maintenance plan depending on service level chosen but associated costs were unclear.
Include initial warranty length of any and all parts, materials and labor.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	29	Didn't provide an actual service level agreement. Dispute services will be within 2 years of engagement?
Provide all system administration and end user documentation of the Client Data Tracking and Case Management system being proposed. Electronic documentation is preferred.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	70	Training documentation rely on Microsoft trainings and gave some examples but not solution specific to DPHHS/CSBG.

The proposal must include a plan that outlines how the system users will be trained on the proposed system. Training will include sufficient information and experience to familiarize users with system and basic operation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	Training plan outlined full end user and blended training models that offers flexibility but lacked detail. Offeror will work with DPHHS to develop strategy.
Provide a plan for training current staff and what training materials and methods will be used.	**60 Points** Superior Response (95-100%) = 57 to 60 Good Response (75-94%) = 45 to 56 Fair Response (60-74%) = 36 to 44 Failed Response (59% or less) = 0 to 35	42	Materials will be developed during strategy sessions. Recommended materials and on demand video library. Provided have adequate methods and methodologies but still no plan.
Describe a plan for training trainers at DPHHS to facilitate ongoing training for new and existing staff who need refreshers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	36	Mentioned strategy of ongoing training but again, lacked detail or examples.

Provide a description of the Service Level Agreement for support and maintenance for cloud hosting in as much detail as possible. Attach copies of the agreements in place as well, or a sample of the sort of agreement that will apply to DPHHS's contract.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	75	Offers 24 hour service and 7-10 central time helpline but support and service center and possible upgrades
Total for Training, Warranty, Maintenance & Support Option(s)	560	**391**	
Section 2: Offeror Qualifications	**200 Points**		
2.1 References	Pass/Fail		
Complete contact information provided.	Pass/Fail	Failed	would provide if they moved on next phase
2.2 Company Profile and Experience	2.5% of points for a possible 100 points		

Detailed description of similar past projects, including:
  • Identify the primary point of contact for this proposal and for the project. Include name, email, phone number, and applicable credential information.
  • Identify all company office locations and total number of employees.
  • Identify how long the company has worked with state offices managing community action programs.
  • Provide the total number of active clients supported on the solution proposed.
  • Provide an overview of how the organization helps state offices and their community action partners to implement the CSBG Results Oriented Management and Accountability (ROMA) and how the organization has responded so far to changes that have been made to ROMA .
	100 Points
	Superior Response (95-100%) = 95 to 100
	Good Response (75-94%) = 75 to 94
	Fair Response (60-74%) = 60 to 74
	Failed Response (59% or less) = 0 to 59
		85	Identified years of work, number of active clients, based in Montana, diversity and inclusion program. Lacking in CSBG program support outcomes and Roma information.

2.3 Resumes	2.5% of points for a possible 100 points		
Key personnel resume's, including summary of qualifications, work experience, education, and skills.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	90	Experience of key personnel matches program needs
Total for Offeror Qualifications	200	**175**	
Section 3: Technical Requirements	**680 Points**		
3.1 Project Specific Characteristics	10% of points for a possible 480 points		

Offerors Response to Attachment 1: Project Characteristics	**480 Points** Superior Response (95-100%) = 456 to 480 Good Response (75-94%) = 360 to 455 Fair Response (60-74%) = 288 to 359 Failed Response (59% or less) = 0 to 287	460	Several specific line items scored in 2-3 range were concerning ability to integrate with other systems but good narrative and description for those response line items.
3.2 Baseline Requirements	5% of points for a possible 200 points		
Offerors Response to Attachment 2: Baseline Requirements	**200 Points** Superior Response (95-100%) = 190 to 200 Good Response (75-94%) = 150 to 189 Fair Response (60-74%) = 120 to 149 Failed Response (59% or less) = 0 to 119	190	System primarily relies on Microsoft which aligns with State's enterprise but many of these licenses are not accounted for in enterprise or cost of proposal.
Total for Technical Specifications	680		
STOP HERE: Part 1 Complete			
Any proposal that fails to achieve eighty percent (80%) of the combined points will be eliminated from further consideration.	3,100 * 80% = 2,480	**1,817**	

empowOR by CSST	Point Values	Points Assigned		Comments
Executive Summary	2.3% of points for a possible 100 points			
The executive summary should include an "executive" level overview of the proposal, emphasizing any unique aspects or strengths of the proposal, a brief description of the proposed system; including its capabilities to meet DPHHS's client data tracking and case management requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95		Relevant examples and comprehensive description provided clear background on CSBG specific and information of their product offerings.
Section 1: Program System Requirements	**2,120 Points**			
1.1 Client Data Tracking and Case Management System	22% of points for a possible 920 points			
The Offeror must provide a detailed description of the Client Data Tracking and Case management solution or product offering. Include an overview of the hardware, software, database architecture, and components of the solution proposed to meet DPHHS's requirements.	**120 Points** Superior Response (95-100%) = 114 to 120 Good Response (75-94%) = 90 to 113 Fair Response (60-74%) = 72 to 89 Failed Response (59% or less) = 0 to 71	90		Allows for comprehensive tracking of both individual and family level data. Offers state of the art system but minimal detail in description of technical aspects.
The Offeror must describe in detail how the system meets traditional and current CSBG data tracking and reporting requirements.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-	75		Indicates understanding of business space with functionalities that align with CSBG elements such as focus on tracking outcome of services and annual reporting.

	74%) = 60 to 74 Failed Response (59% or less) = 0 to 59		No details, screenshots, or examples.
The Offeror must describe how the system will support the data entry, data retrieval and data analysis need of DPHHS's program staff and the staff of DPHHS's service delivery partners.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	85	Identified user friendly interface accessible via user dashboard but would have liked examples
The Offeror must describe what equipment will have to be purchased to support the proposed solution and provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Included web browser functionality and provided justification
The Offeror must describe DPHHS's rights to data and what level of control DPHHS will have over data entered in the system.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	94	1) 95, Clearly stated ownership, export, and administrator rights to configure different security access levels.

The Offeror must describe the format in which data entered by DPHHS will be provided to DPHHS in the event of separation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	90	Standardized format such as CSV to integrate and maintain data.
The Offeror must describe DPHHS's hosting options.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	37	Stated cloud based hosted by only one vendor. Bulleted response lacked detail
The Offeror must describe whether the system is cloud based, who the cloud offeror is, and what region the cloud provider is located.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	80	System is cloud based and included where provider is located with qualifications including info on audits and continuity.

The Offeror must describe in detail the overall system architecture of the solution being proposed.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	60	Built on Microsoft functionality, flexible code base and user interface. Lacks architectural details or diagrams
The Offeror must describe how the solution facilitates the use of electronic signatures.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Laser system is different but has similar functionality. Would have liked to see supporting details on how it works. No indication of ability to indicate or digital capture wet signature.
The Offeror must describe how the solution facilitates a paperless service provision environment.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	42	Describes comprehensive digital client intake through customizable forms and templates. Doesn't relate or explain how staff will use or functionality beyond just document upload.
Total for Client Data Tracking and Case Management System	920	**733**	
1.2 Implementation Plan and Project Management	15% of points for a possible 640 points		

Provide a detailed description of the implementation plan.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	80	Four key phases that matched relevant components of this project and each was designed to address specific process. Expecting details related to methodology.
Provide the estimated project schedule with detailed timeline and a complete description of the key activities required for the installation of the proposed system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Referenced deliverable deadlines and statements about UAT and SAS systems. No discussion of methodology for managing details.
Provide a description of how updates on the project will be provided to DPHHS on a weekly basis.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	42	Very detailed multi-structured multi channel with overview of critical tasks.
Describe the project team members and other key personnel and identify the tasks both the Offeror and DPHHS will perform to successfully implement the proposed system.	**90 Points** Superior Response (95-100%) = 85 to 90 Good Response (75-94%) = 67 to 84	60	Plan contains 2 ROMA certified professionals, very relevant program knowledge as well as implementation experience but staff roles were not identified.

	Fair Response (60-74%) = 54 to 66 Failed Response (59% or less) = 0 to 53		
Identify any equipment DPHHS needs to purchase prior to installation date. Provide a detailed list with proposed costs.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	45	Identified potential hardware needs and provided justification.
For solutions that will require customization to a base product to meet DPHHS's requirements a detailed estimate and description of proposed customizations and associated cost estimates on top of base costs shall be included in the proposal.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	60	System is designed specifically for CSBG reporting with comprehensive features and indicates they can do customizations at high level but did not provide any details, examples, or costs.
Describe how you will coordinate with DPHHS's Information Technology Office.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	47	Engage and maintain communication though initial planning and hold status update meetings through established methods of communications.

Provide a detailed plan regarding cut over from existing system to the new system.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	37	Response recognized when our current system will expire and deliverables and phase 2 of plan contained integration and mapping plan. Did not include what type of files for integration
Describe how the proposed system will work behind DPHHS's firewall – if applicable.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	No indication of potential for vane connections, etc.
Describe how you will coordinate with DPHHS's Information Technology office to configure any necessary servers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	35	Met requirements
Total for Implementation Plan and Project Management	640	**476**	
1.3 Training, Warranty, Maintenance and Support Option(s)	13% of points for a possible 560 points		

Provide a complete maintenance plan and warranty plan as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	50	No maintenance or warranty or description of coverage
Include initial warranty length of any and all parts, materials and labor.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	29	Nice description of uptime guarantee but just stated web based application so no need for warranty.
Provide all system administration and end user documentation of the Client Data Tracking and Case Management system being proposed. Electronic documentation is preferred.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	95	Great detail of relevant materials and audiences. Provided table of customer specific current videos and documentations with examples.
The proposal must include a plan that outlines how the system users will be trained on the proposed system. Training will include sufficient information and experience to familiarize users with system and basic operation.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94	80	State office and CAA training were comprehensive and examples provided in additional documents. Material and method identified but not a true plan.

	Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59		
Provide a plan for training current staff and what training materials and methods will be used.	**60 Points** Superior Response (95-100%) = 57 to 60 Good Response (75-94%) = 45 to 56 Fair Response (60-74%) = 36 to 44 Failed Response (59% or less) = 0 to 35	56	Utilizes combination of written materials and zoom trainings and having homework between sessions.
Describe a plan for training trainers at DPHHS to facilitate ongoing training for new and existing staff who need refreshers.	**50 Points** Superior Response (95-100%) = 48 to 50 Good Response (75-94%) = 38 to 47 Fair Response (60-74%) = 30 to 37 Failed Response (59% or less) = 0 to 29	43	Didn't actually provide a plan, but went into depth on the indicated tools available.
Provide a description of the Service Level Agreement for support and maintenance for cloud hosting in as much detail as possible. Attach copies of the agreements in place as well, or a sample of the sort of agreement that will apply to DPHHS's contract.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	74	Provided times and response time within 2 hours for urgent cases is standard. would have liked to see more examples on severity levels and hosting agreement

Total for Training, Warranty, Maintenance & Support Option(s)	560	**427**	
Section 2: Offeror Qualifications	**200 Points**		
2.1 References	Pass/Fail		
Complete contact information provided.	Pass/Fail	Pass	
2.2 Company Profile and Experience	2.5% of points for a possible 100 points		
Detailed description of similar past projects, including: • Identify the primary point of contact for this proposal and for the project. Include name, email, phone number, and applicable credential information. • Identify all company office locations and total number of employees. • Identify how long the company has worked with state offices managing community action programs. • Provide the total number of active clients supported on the solution proposed. • Provide an overview of how the organization helps state offices and their community action partners to implement the CSBG Results Oriented Management and Accountability (ROMA) and how the organization has responded so far to changes that have been made to ROMA .	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	88	1) 98, adequate detail 2) 100, clearly outlined in table 3) 80, concerns regarding ability to support department with size of this agency 4) 98, relevant information and experience with Roma and CAA trained staff
2.3 Resumes	2.5% of points for a possible 100 points		
Key personnel resume's, including summary of qualifications, work experience, education, and skills.	**100 Points** Superior Response (95-100%) = 95 to 100 Good Response (75-94%) = 75 to 94 Fair Response (60-74%) = 60 to 74 Failed Response (59% or less) = 0 to 59	90	Relevant experience listed but not detailed and there weren't specific resumes.

Total for Offeror Qualifications	200	**178**	
Section 3: Technical Requirements	**680 Points**		
3.1 Project Specific Characteristics	10% of points for a possible 480 points		
Offerors Response to Attachment 1: Project Characteristics	**480 Points** Superior Response (95-100%) = 456 to 480 Good Response (75-94%) = 360 to 455 Fair Response (60-74%) = 288 to 359 Failed Response (59% or less) = 0 to 287	450	Responses to this section and baseline section are very different and counter intuitive from the each other.
3.2 Baseline Requirements	5% of points for a possible 200 points		
Offerors Response to Attachment 2: Baseline Requirements	**200 Points** Superior Response (95-100%) = 190 to 200 Good Response (75-94%) = 150 to 189 Fair Response (60-74%) = 120 to 149 Failed Response (59% or less) = 0 to 119	115	Significant number of items indicates to me that they don't understand the requirement and or are not willing to work with the state of the department boundaries with this product.
Total for Technical Specifications	680	**565**	
STOP HERE: Part 1 Complete			

| **Any proposal that fails to achieve eighty percent (80%) of the combined points will be eliminated from further consideration.** | 3,100 * 80% = 2,480 | **2,474** |