

State of Maine
RFP / Proposal Master Score Sheet

Instructions: Complete the Master Score Sheet below providing all of the requested information for each bidder that submitted a proposal in response to the RFP. This document is to be included in the Selection Package submitted to the Division of Procurement Services for review/approval.

SCORESHEET FOR RFP# 201904061: Maine Comprehensive Child Welfare Information System									
PROPOSAL SUBMITTED BY:		Binti, Inc.		CGI Technologies and Solutions, Inc.		Currier, McCabe and Associates, Inc. dba CMA		Deloitte Consulting LLP	
COST:		Cost:	\$49,050,000.00	Cost:	\$59,624,621.00	Cost:	\$41,495,147.00	Cost:	\$36,419,087.00
EVALUATION ITEM	POINTS AVAILABLE/ REQUIRED POINTS								
Stage One: Eligibility to Submit Bids	Pass/Fail		Fail		Pass		Fail		Pass
Stage Two - Section I: Organization Qualifications and Experience	30/18				28.00				24.00
Stage Three - Section II: Proposed Services	45/27				31.00				39.00
Stage 4 - Section III: Cost Proposal	25				15.27				25.00
TOTAL	<u>100</u>		Disqualified at Stage One		74.27		Disqualified at Stage One		88.00
PROPOSAL SUBMITTED BY:		Digital Mobile Innovations, LLC (DMI)		International Business Machines Corporation (IBM)		Infosys Public Services		KPMG LLP	
COST:		Cost:	\$46,306,484.70	Cost:	\$64,687,349.21	Cost:	\$41,759,041.00	Cost:	\$48,640,445.00
EVALUATION ITEM	POINTS AVAIL.								
Stage One: Eligibility to Submit Bids	Pass/Fail		Fail		Pass		Fail		Pass
Stage Two - Section I: Organization Qualifications and Experience	30/18				21.00				15.00
Stage Three - Section II: Proposed Services	45/27				35.00				
Stage 4 - Section III: Cost Proposal	25				14.08				
TOTAL	<u>100</u>		Disqualified at Stage One		70.08		Disqualified at Stage One		Disqualified at Stage Two



Award Justification Statement
RFP# 201904061 Maine Comprehensive Child Welfare Information System

I. Summary

Eight Bidders responded to RFP# 201904061 – Binti, Inc. (Binti), CGI Technologies and Solutions, Inc. (CGI), Currier, McCabe and Associates, Inc. dba CMA (CMA), Deloitte Consulting LLP (Deloitte), Digital Mobile Innovations, LLC (DMI), International Business Machines Corporation (IBM), Infosys Public Services (Infosys), and KPMG, LLP (KPMG). Through the evaluation process, Deloitte was the highest scoring Bidder and determined to provide the best value to the State of Maine.

II. Evaluation Process

The evaluation team applied the consensus method in scoring the Bidders Qualifications & Experience, and Proposed Services. The Cost Proposal was scored utilizing a numeric formula. The evaluation process consisted of Five Stages as summarized below:

- Stage One: Proposals must have met the eligibility requirements of Part I.C. of the RFP to move to Stage Two.
- Stage Two: Proposals must have received a minimum score of 18 to move to Stage Three.
- Stage Three: Proposals must have received a minimum score of 27 to move to Stage Four.
- Stage Four: Included Proposals which scored 27 or higher in Stage Four.
- Stage Five: Final evaluation based on Bidder demonstrations of the proposed solution.

Bidder	<u>Stage One</u> Eligibility	<u>Stage Two</u> Qualifications & Experience	<u>Stage Three</u> Proposed Services	<u>Stage</u> <u>Four/Five</u> Cost Proposal	<u>TOTAL</u>
Binti	Fail				Disqualified
CGI	Pass	28.00	31.00	15.27	74.27
CMA	Fail				Disqualified
Deloitte	Pass	24.00	39.00	25.00	88.00
DMI	Fail				Disqualified
IBM	Pass	21.00	35.00	14.08	70.08
Infosys	Fail				Disqualified
KPMG	Pass	15.00			Disqualified

III. Qualifications & Experience

CGI:

- Has a CCWIS-compliant system in production.

- Thirty-five years' experience with complex government solutions, including twenty-five years of in Child Welfare.
- Based on the Dun & Bradstreet, CGI has a "Very stable condition and a strong likelihood of continued-operation".
- The State has had positive experience working with the CGI on the Advantage application.

Deloitte:

- Fully implemented a CCWIS system within sixteen months.
- Twenty-two Child Welfare systems since 1993 with ten currently active Child Welfare projects.
- The Dun & Bradstreet indicates "low risk organization".
- The Department has positive contract history with Deloitte which includes the Maine Integrated Health Management Solution (MIHMS) project.

IBM:

- Receiving conditional federal approval for a CCWIS system to be implemented.
- Leader in data analytics with twenty states utilizing IBM's data warehousing.
- Although a full Dun & Bradstreet was not provided, what was provided indicates "low risk organization".

KPMG:

- Experience working with Child Welfare in multiple states but did not demonstrate direct experience implementing a CCWIS system in another state.
- Did not provide a Dun & Bradstreet report as required by the RFP.
- The Department has positive contract experience with KPMG.
- Did not meet the minimum score of 18 and therefore was disqualified at Stage 2.

IV. Proposed Services

CGI:

- Will transfer Ohio's existing system and leverage components of West Virginia's system to expediate implementation. System is mature and stable.
- Offline Mobility feature is under development.
- Solution would be hosted on-premise at Maine OIT.
- Case information is spread across multiple tabs and does not provide a holistic view of the case in a single screen.
- Thirty-month implementation plan.

Deloitte:

- Transfer solution built on a Salesforce SaaS platform, which has been implemented/in use in Delaware.
- Has offline capability.
- Robust financial management module.
- Robust performance dashboard.
- Eighteen-month implantation.

IBM:

- SaaS system which has been implemented/in use in North Carolina.
- Mobile functionality is robust and sophisticated.
- Fully embedded Structured Decision Making (SDM).
- Provides case worker centric with intuitive workflows and streamlined dashboards.
- Eighteen-month implementation.

V. Cost Proposal

Description	CGI	Deloitte	IBM
Deployment	\$17,773,754	\$12,342,383	\$17,638,272.74
Hosting and Operations	\$14,461,577	\$13,613,228	\$35,779,947.38
Estimated OIT Hosted Server and Storage Fees	\$27,389,290	\$0	\$0
Licenses	\$0	\$10,463,476	\$11,269,129.09
Total Proposed Cost	\$59,624,621	\$36,419,087	\$64,687,349.21

VI. Conclusion

Binti, CMA, and Infosys did not meet the eligibility requirements of Part I.C. of the RFP and therefore were disqualified. KPMG did not meet the minimum score requirement for Stage Two and therefore was disqualified. Out of the total 100 available points, Deloitte scored 88.00, with CGI scoring 74.27 and IBM scoring 70.08. The strengths of Deloitte's proposal greatly outweighed CGI and IBM including the proposed systems functionality and offline capabilities. Based on the justification provided, the DHHS Evaluation Team determined that the proposal submitted by Deloitte represents the best value to the State of Maine.

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



Maine Department of Health and Human Services
Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

July 11, 2019

Via Electronic Mail: karri@binti.com

Karri Biehle
Binti Inc
1212 Broadway, Suite 2000
Oakland, CA 94612

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Ms. Biehle,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Deloitte Consulting LLP

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract.

Any person aggrieved by this award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of

notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).

Thank you for your interest in doing business with the State of Maine.

Sincerely,



Todd A. Landry, Ed.D.
Director
Office of Child and Family Services
Maine Department of Health and Human Services

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



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Augusta, Maine 04333-0011
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TTY: Dial 711 (Maine Relay)

July 11, 2019

Via Electronic Mail: Sandra.Maloney@cgi.com

Sandra Maloney
CGI Technologies and Solutions Inc.
11325 Random Hills Road
Fairfax, VA 22030

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Ms. Maloney,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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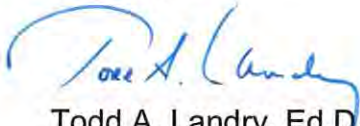
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Director

Office of Child and Family Services

Maine Department of Health and Human Services

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TTY: Dial 711 (Maine Relay)

July 11, 2019

Via Electronic Mail: Gdavis@cma.com

Gary Davis, Executive VP
Currier, McCabe and Associates, Inc. dba CMA
700 Troy Schenectady Road
Latham, NY 12110

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Mr. Davis,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Deloitte Consulting LLP

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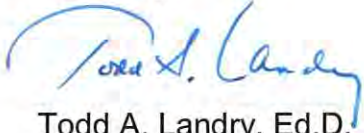
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

A handwritten signature in blue ink that reads "Todd A. Landry". The signature is fluid and cursive, with a large initial "T" and "L".

Todd A. Landry, Ed.D.
Director
Office of Child and Family Services
Maine Department of Health and Human Services

Janet T. Mills
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July 11, 2019

Via Electronic Mail: sworkman@deloitte.com

Scott Workman, Managing Director
Deloitte Consulting LLP
7 Eagle Square, Suite 301
Concord, NH 03301

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Mr. Workman,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely,



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Maine Department of Health and Human Services

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109 Capitol Street
Augusta, Maine 04333-0011
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TTY: Dial 711 (Maine Relay)

July 11, 2019

Via Electronic Mail: nthakker@dminc.com

Nish Thakker, VP Sales
Digital Mobile Innovations, LLC
6550 Rock Spring Drive, 7th Floor
Bethesda, MD 20817

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Ms. Thakker,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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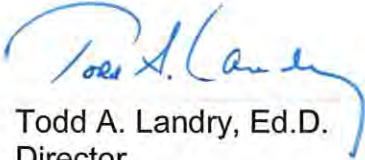
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Sincerely,

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Todd A. Landry, Ed.D.
Director
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Maine Department of Health and Human Services

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TTY: Dial 711 (Maine Relay)

July 11, 2019

Via Electronic Mail: Kevin.Murphy1@ibm.com

Kevin D. Murphy
International Business Machines Corporation
80 State Street
Albany, NY 12207

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Mr. Murphy,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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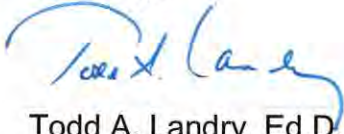
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Todd A. Landry, Ed.D.
Director
Office of Child and Family Services
Maine Department of Health and Human Services

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109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

July 11, 2019

Via Electronic Mail: [Punyajit B@infosys.com](mailto:Punyajit_B@infosys.com)

Punyajit Bhattacharya
Infosys Public Services
800 King Farm Boulevard, Suite 505
Rockville, MD 20850

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Mr. Bhattacharya,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Todd A. Landry, Ed.D.
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Maine Department of Health and Human Services

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July 11, 2019

Via Electronic Mail: asachde@kpmg.com

Amit C. Sachde, Principal
KPMG LLP
Two Financial Center, 60 South Street
Boston, MA 02111

SUBJECT: Notice of Conditional Contract Award under RFP #201904061 - Maine
Comprehensive Child Welfare Information System

Dear Mr. Sachde,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services for Maine Comprehensive Child Welfare Information System. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely,



Todd A. Landry, Ed.D.
Director
Office of Child and Family Services
Maine Department of Health and Human Services

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER: Binti, Inc.
DATE: June 14, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services
NAME OF RFP COORDINATOR: Deb Downer
NAMES OF EVALUATORS: Robert Blanchard and Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 		<p>X*</p>
<p>* Based on the projects provided in Appendix C, the Bidder failed to demonstrate the eligibility requirements as outline in Part I.C. of the RFP. Therefore, the Bidder is disqualified at Stage One.</p>		

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: CGI Technologies and Solutions, Inc.

DATE: June 24, 2019, June 26, 2019, July 9, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Deb Downer

NAMES OF EVALUATORS: Robert Blanchard, Jenny Dillihunt Brown, Gina Googins, Jenna Joeckel, Daniel Lynch, Gilman Ouellette, Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 	X	
	<u>Points Awarded:</u>	
Numerical Score:		
Section I. Organization Qualifications and Experience (Max: 30 Points)	28.00	
Section II. Proposed Services (Max: 45 Points)	31.00	
Section III: Cost Proposal (Max: 25 Points)	15.27	
TOTAL POINTS (Max: 100 Points)	74.27	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: CGI Technologies and Solutions, Inc.

DATE: June 24, 2019, June 26, 2019, July 9, 2019

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

Total Points Available: 30

Score: 28.00

Evaluation Team Comments:

Part IV.B. Section I
1. Overview of the Organization (met the minimum for this section)
<ul style="list-style-type: none"> • The State has positive experience working with the Bidder on the Advantage application. • Projects indicated large number of users. • Twenty-five (25) years of experience in Child Welfare. • Projects were expansive including more modules than required. • Thirty-five (35) years of experience working within complex government solution. • Experience with an on-premise CPS. • Experienced with organization readiness (California) helping with preparation regarding a transition to a new system. • Currently working on transitioning Wisconsin's "Power Builder System". • Indicated having a CCWIS-compliant system in production. • Experience with Agile methodologies.
2. Subcontractors (met the minimum for this section)
3. Organizational Chart (met the minimum for this section)
<ul style="list-style-type: none"> • Team would have liked the organizational chart to identify positions related to Organizational Development/Change Management and Subject Matter Expert. • Organizational chart included an Executive Sponsor.
4. Litigation (met the minimum for this section)
<ul style="list-style-type: none"> • Provided a list disclosing litigation.
5. Financial Viability (met the minimum for this section)
<ul style="list-style-type: none"> • Dun and Bradstreet indicated: <ul style="list-style-type: none"> ○ "Very stable condition and a strong likelihood of continued-operation". ○ 43 years in business. ○ High credit rating. • Provided a bank reference and a letter from a surety company.
6. Licensure/Certification (met the minimum for this section)
<ul style="list-style-type: none"> • Provided proof of Level 5 Capability Maturity Model. • Provided various ISO certification pertinent to this project.
7. Certificate of Insurance (met the minimum for this section)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: CGI Technologies and Solutions, Inc.

DATE: June 24, 2019, June 26, 2019, July 9, 2019

**EVALUATION OF SECTION II
Proposed Services**

Total Points Available: 45

Score: 31.00

Evaluation Team Comments:

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements (met the minimum of this section)
B. CCWIS Functionalities and Priorities (met the minimum of 1, 2, 3, 4, 5, 6, 7, 8, 9)
<ul style="list-style-type: none"> • Proposed system is in a mature and stable state.
(1)
<ul style="list-style-type: none"> • Proposed transferring Ohio's existing system and leveraging components of West Virginia's system to expediate implementation. • Indicated replacing MACWIS within twenty (20) months, with ten (10) of fine-tuning following the replacement. The Bidder will bring project accelerators to jump start the project.
(4)
<ul style="list-style-type: none"> • Proposes a "Human Centered Design", helping with the end-user decision making process.
(8)
<ul style="list-style-type: none"> • Indicated utilizing Lessons Learned in the data conversion process.
C. CCWIS Document Repository Expectations (met the minimum of this section)
<ul style="list-style-type: none"> • Proposes using SharePoint, on-premise.
D. Management Approach (met the minimum of 1, 2, 3)
(1)
<ul style="list-style-type: none"> • Proposes utilize a hybrid Agile approach.
(2)
<ul style="list-style-type: none"> • Indicated utilizing Child Welfare Subject Matter Experts across all teams. • Proposes utilizing Client Partnership Management Framework as part of the Management Approach. The Client Partnership Management Framework is ISO 9001-certified and is mature. • Proposed Management Approach will require dedicated State resources.
E. CCWIS Hosting (met the minimum of this section)
<ul style="list-style-type: none"> • Proposed solution would be hosted on-premise at Maine OIT.
F. CCWIS Technical Requirements (met the minimum of 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13)
(2)
<ul style="list-style-type: none"> • Mobility feature does not address connectivity to the on-premise hosted solution. • Mobility feature does not address remote connectivity. <ul style="list-style-type: none"> ○ Based on the Demonstration, offline access is currently in development. The State would need to identify what features would need offline capability. • Interstate Compact for the Protection of Children solution includes National Electronic Interstate Compact Enterprise System.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: CGI Technologies and Solutions, Inc.

DATE: June 24, 2019, June 26, 2019, July 9, 2019

<ul style="list-style-type: none"> • Case management workflows include family team meetings. • Proposes integration with the State’s active directory. • Proposed Solution includes NCCD’s Structured Decision-Making tools. • Includes a full resource management workflow, including licensing management. • Title IV-E module integrates with the financial module. • Proposed system utilized Java. Historically Java requires frequent updates to user devices. 	
(3)	
<ul style="list-style-type: none"> • Bidder has conducted a data classification to meet HIPAA requirements. • Demonstrated an understanding of OIT policy requirements. 	
(4)	
<ul style="list-style-type: none"> • Indicated utilizing State tools. 	
(5)	
<ul style="list-style-type: none"> • Demonstrated experience developing some of the required bidirectional interfaces in other jurisdictions. 	
(6)	
<ul style="list-style-type: none"> • Proposes six (6) teams working concurrently. 	
(10)	
<ul style="list-style-type: none"> • Indicated baseline solution has over two hundred (200) already developed reports, including all federally recognized reporting requirements. 	
(13)	
<ul style="list-style-type: none"> • Provided a thoughtful and detailed training plan. 	
G. Operations and Maintenance (met the minimum of 2)	
<ul style="list-style-type: none"> • It is not clear how the Bidder will work with the State at the platform level. • Technical architecture does not specify the details of the platform. 	
H. Software Ownership and Application Transfer (met the minimum of 1, 2, 3)	
I. Staffing Requirements (met the minimum of 1, 2, 3, 4, 5, 7)	
(3)	
<ul style="list-style-type: none"> • Subject Matter Expert for Child Welfare does not have any direct field experience with child welfare. 	
(5)	
<ul style="list-style-type: none"> • State resource staff time may be underestimated. 	
(6)	
<ul style="list-style-type: none"> • Staff resumes do not demonstrate experience working on the Bidder’s Ohio and West Virginia CCWIS projects. • Minimum Qualification of resumes appear to not be met. 	
2. Initial Performance Period Summary Level Plan	
<ul style="list-style-type: none"> • Did not identify project staff responsible for specific tasks. 	
3. Technical Solution – Including Licensing and Integration Information (met the minimum requirements)	
<ul style="list-style-type: none"> • Proposed solution does not appear functionally advanced. • Narrative of modules lacked description. • Did not provide exhibits of mobile functionality. • Narrative response included information not applicable to this RFP. 	
Demonstrations:	
<ul style="list-style-type: none"> • Proposed system includes a Court Calendar. 	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: CGI Technologies and Solutions, Inc.

DATE: June 24, 2019, June 26, 2019, July 9, 2019

- | |
|---|
| <ul style="list-style-type: none">• Demonstration focused on utilizing the system using a tablet device.• Case information was spread across multiple tabs and did not provide a holistic view of the case in a single screen. |
|---|

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: CGI Technologies and Solutions, Inc.

DATE: June 24, 2019, June 26, 2019, July 9, 2019

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25

Score: 15.27

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$36,419,087.00	÷	\$59,624,621.00	x	25 points	=	15.27

Evaluation Team Comments:

The Department utilized an OIT consulting team to determine the estimated cost for OIT Hosted Server and Storage Fees as described within the RFP. The estimated cost was added to the Bidder's proposed cost which determined the total cost for the Bidder to provide the CCWIS services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER: Currier, McCabe and Associates, Inc. dba CMA
DATE: June 14, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services
NAME OF RFP COORDINATOR: Deb Downer
NAMES OF EVALUATORS: Robert Blanchard and Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 		X*
<p>* Based on the projects provided in Appendix C, the Bidder failed to demonstrate the eligibility requirements as outline in Part I.C. of the RFP. Therefore, the Bidder is disqualified at Stage One.</p>		

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER: Deloitte Consulting LLP
DATE: June 24, 2019, June 26, 2019, July 9, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services
NAME OF RFP COORDINATOR: Deb Downer
NAMES OF EVALUATORS: Robert Blanchard, Jenny Dillihunt Brown, Gina Googins, Jenna Joeckel, Daniel Lynch, Gilman Ouellette, Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 30 Points)	24.00
Section II. Proposed Services	(Max: 45 Points)	39.00
Section III: Cost Proposal	(Max: 25 Points)	25.00
TOTAL POINTS		88.00

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER: Deloitte Consulting LLP
DATE: June 24, 2019, June 26, 2019, July 9, 2019

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

Total Points Available: 30 Score: 24.00

Evaluation Team Comments:

Part IV.B. Section I
1. Overview of the Organization (met the minimum for this section)
<ul style="list-style-type: none"> • Indicated a fully implemented CCWIS system in Delaware. • Indicated the Delaware CCWIS system was implemented in 16 months. • Implemented NCCD Structed Decision Making Tool within their FOCUS system. • 10 active child welfare projects, 22 Child Welfare systems since 1993. • Indicated being able to leverage functionality from other state projects. • Bidder’s child welfare system operates in Alleghany County, PA. • Leading Salesforce implementor as identified by Salesforce. • A Gartner-recognized CRM and SaaS industry leader. • Experience working with the Department on the Maine Integrated Health Management Solution (MIHMS) project and other DHHS project. However, the role on the MIHMS project was overstated. • The Department has positive contract history with the Bidder. • Currently working with 3 states, implementing a CPS on a Salesforce platform. • Experienced with Agile methodologies. • 4th largest privately-owned companies in the US.
2. Subcontractors (met the minimum for this section)
3. Organizational Chart (met the minimum for this section)
<ul style="list-style-type: none"> • Does not provide any executive leadership, beyond that of the Project Manager. • Team would have liked the organizational chart to identify positions related to Organizational Development/Change Management.
4. Litigation
<ul style="list-style-type: none"> • The Bidder did not provide a list of all current or closed litigation within the past 5 years, as required by the RFP.
5. Financial Viability (met the minimum for this section)
<ul style="list-style-type: none"> • The Dun and Bradstreet report indicated: <ul style="list-style-type: none"> ○ High credit limit ○ Low risk organization • Provided a bank reference and a letter from a surety company.
6. Licensure/Certification (met the minimum for this section)
7. Certificate of Insurance (met the minimum for this section)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: Deloitte Consulting LLP

DATE: June 24, 2019, June 26, 2019, July 9, 2019

**EVALUATION OF SECTION II
Proposed Services**

Total Points Available: 45

Score: 39.00

Evaluation Team Comments:

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements (met the minimum of this section)
B. CCWIS Functionalities and Priorities (met the minimum of 1, 2, 3, 4, 5, 6, 7, 8, 9)
(1)
<ul style="list-style-type: none"> • Proposed solution is built on a Salesforce SaaS platform. • Part of the proposed solution is NextGen 4.0, a transfer system. • Proposes to implement the solution in eighteen (18) months, followed by a one (1) month pilot. • Proposed solution includes real-time operational dashboards for data-driven decision making. • Proposes a SAFe Agile Implementation.
(3)
<ul style="list-style-type: none"> • “Human Centric Design Approach”, helping the end-user decision making process.
(4)
<ul style="list-style-type: none"> • Indicated data entry is done one-time, easily accessed by others. • Each user will have their own homepage with user-specific dashboard and ad-hoc drag-and-drop reporting. • Proposed solution is device-agnostic.
(5)
<ul style="list-style-type: none"> • Proposed systems will automatically distribute reports to user groups.
(6)
<ul style="list-style-type: none"> • Proposes an effective set of tools within the proposed solution.
C. CCWIS Document Repository Expectations (met the minimum of this section)
<ul style="list-style-type: none"> • Proposes utilizing SharePoint, on-premise. • Proposes pre-loading the SharePoint site with documents and references from previous clients.
D. Management Approach (met the minimum of 1, 2, 3)
(2)
<ul style="list-style-type: none"> • Proposes an Agile Coach to assist the Department with the project.
E. CCWIS Hosting (met the minimum of this section)
<ul style="list-style-type: none"> • Proposed solution: <ul style="list-style-type: none"> ○ Is cloud hosted. ○ FedRAMP-certified at a moderate level. ○ Includes Electronic Document Management System.
F. CCWIS Technical Requirements (met the minimum of 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: Deloitte Consulting LLP

DATE: June 24, 2019, June 26, 2019, July 9, 2019

<p>(2)</p> <ul style="list-style-type: none"> • Proposed Document Repository used to manage document across business function. • Proposed solution includes the mandatory federal report. • Proposes a Mandated Reporter portal. • Robust Financial Management module • Interstate Compact for the Protection of Children solution includes National Electronic Interstate Compact Enterprise System. • There is no indication Access Management integrates with the State’s Active Directory. <p>(3)</p> <ul style="list-style-type: none"> • Proposed system is not currently HIPAA compliant. However, it is indicated it has the ability to be. <p>(5)</p> <ul style="list-style-type: none"> • Demonstrated experience developing the required bidirectional interfaces in other jurisdictions, with potential high rate of reuse. <p>(9)</p> <ul style="list-style-type: none"> • Indicated experience completing migrations of similar data sets in other jurisdictions. • Data migration strategy includes Iterative approach and mock conversions. <p>(11)</p> <ul style="list-style-type: none"> • Provided a detailed response related to data analytics tools. <p>(13)</p> <ul style="list-style-type: none"> • Provided thorough and comprehensive plans.
G. Operations and Maintenance (met the minimum of 1, 2)
<p>(1)</p> <ul style="list-style-type: none"> • It is indicated there would need to be a contract between Salesforce and the State to support the proposed solution. This could create a challenging situation related to support. <p>(2)</p> <ul style="list-style-type: none"> • Proposed using State telephony and ticketing for helpdesk operations, which would not be a viable option.
H. Software Ownership and Application Transfer (met the minimum of 1, 2, 3)
<p>(2)</p> <ul style="list-style-type: none"> • This is a hybrid-SaaS solution, in which the Department will obtain ownership of the proposed system at the end of the resulting contract renewals.
I. Staffing Requirements (met the minimum of 1, 2, 3, 4, 6, 7)
<p>(3)</p> <ul style="list-style-type: none"> • Based on resume, Subject Matter Expert for Child Welfare does not have any direct field experience with child welfare. <p>(5)</p> <ul style="list-style-type: none"> • Did not identify the number Department or OIT resources who would be needed. <p>(6)</p> <ul style="list-style-type: none"> • Proposed team demonstrates direct experience working with the proposed solution.
2. Initial Performance Period Summary Level Plan (meet the minimum requirements)
<ul style="list-style-type: none"> • Provided a detailed structure for the initial development and implementation periods.
3. Technical Solution – Including Licensing and Integration Information
<ul style="list-style-type: none"> • Vendor accountability model is not clear. • Long-term maintenance of NextGen 4.0 was not addressed.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: Deloitte Consulting LLP

DATE: June 24, 2019, June 26, 2019, July 9, 2019

Demonstrations:

- | |
|---|
| <ul style="list-style-type: none">• Proposed solution has offline capability.• Proposed solution integrates with Microsoft Outlook.• A global search function is part of the system.• Robust performance dashboard.• Proposed solution includes a flexible hierarchy management function. |
|---|

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: Deloitte Consulting LLP

DATE: June 24, 2019, June 26, 2019, July 9, 2019

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25

Score: 25.00

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$36,419,087.00	÷	\$36,419,087.00	x	25 points	=	25.00

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER: Digital Mobile Innovations, LLC (DMI)
DATE: June 24, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services
NAME OF RFP COORDINATOR: Deb Downer
NAMES OF EVALUATORS: Robert Blanchard, Jenny Dillihunt Brown, Gina Googins, Jenna Joeckel, Daniel Lynch, Gilman Ouellette, Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 		<p>X*</p>
<p>* Based on the projects provided in Appendix C, the Bidder failed to demonstrate the eligibility requirements as outline in Part I.C. of the RFP. Therefore, the Bidder is disqualified at Stage One.</p>		

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: International Business Machines Corporation (IBM)

DATE: June 24, 2019, June 27, 2019, July 9, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Deb Downer

NAMES OF EVALUATORS: Robert Blanchard, Jenny Dillihunt Brown, Gina Googins, Jenna Joeckel, Daniel Lynch, Gilman Ouellette, Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 30 Points)	21.00
Section II. Proposed Services	(Max: 45 Points)	35.00
Section III: Cost Proposal	(Max: 25 Points)	14.08
TOTAL POINTS		70.08

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: International Business Machines Corporation (IBM)

DATE: June 24, 2019, June 27, 2019, July 9, 2019

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

Total Points Available: 30

Score: 21.00

Evaluation Team Comments:

Part IV.B. Section I
1. Overview of the Organization (met the minimum for this section)
<ul style="list-style-type: none"> • The Bidder provided a 4th project, as the RFP requested only 3 projects, it was not considered for review. • Indicated receiving conditional-approval under CCWIS Guidelines for North Carolina's CCWIS. • Experience with CCWIS in multiple states with a large number of users. • 20 states utilize the Bidder's data warehousing. • Indicated being a leader in data analytics. • Experienced with Agile methodologies. • Implemented NCCD Structed Decision Making Tool within CCWIS.
2. Subcontractors (met the minimum for this section)
<ul style="list-style-type: none"> • Proposes utilizing Diona and NCCD as subcontractors. • Indicated Diona is an accomplished provider of COTS Mobile Solutions.
3. Organizational Chart (met the minimum for this section)
<ul style="list-style-type: none"> • Technical staff not identified. • Project Executive and Project Manager are on the same line; therefore, the Team could not determine who will have accountability for the project. • Indicates use of a Project Advisory Board. • Team would have liked the organizational chart to identify positions related to Organizational Development/Change Management.
4. Litigation
<ul style="list-style-type: none"> • The Bidder did not provide a list of all current or closed litigation within the past 5 years, as required by the RFP. Instead the Bidder provided a link to the annual report which does not meet the requirements of the RFP.
5. Financial Viability
<ul style="list-style-type: none"> • The Bidder only provided the overview of the Dun and Bradstreet Report. • Based on the provided information within the Dun and Bradstreet the Bidder has a fair credit rating and is rated low-risk. • Provided a bank reference and a letter from a surety company.
6. Licensure/Certification (met the minimum for this section)
7. Certificate of Insurance (met the minimum for this section)
<ul style="list-style-type: none"> • There is no indication of Cyber Liability coverage.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: International Business Machines Corporation (IBM)

DATE: June 24, 2019, June 27, 2019, July 9, 2019

**EVALUATION OF SECTION II
Proposed Services**

Total Points Available: 45

Score: 35.00

Evaluation Team Comments: The response to this section did not provide the resources, methods and/or strategies to be utilized during service delivery.

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements (met the minimum of this section)
B. CCWIS Functionalities and Priorities (met the minimum of 1, 2, 3, 4, 5, 6, 7, 8, 9)
(2)
<ul style="list-style-type: none"> • Proposed solution is a SaaS system. • Proposes to implement the solution within eighteen (18) months. • Proposed system utilizes Java. Historically Java requires frequent updates to user devices.
(4)
<ul style="list-style-type: none"> • Provided a thorough workspace example.
(6)
<ul style="list-style-type: none"> • System includes pre-built rules. • System included a business rules engine and a process management tool.
(8)
<ul style="list-style-type: none"> • Did not provide clear methodology or tools utilized in the past or would be utilized as part of this Legacy System data migration.
C. CCWIS Document Repository Expectations (met the minimum of this section)
<ul style="list-style-type: none"> • Proposes utilizing Box.com for file management and data sharing. Security requirements would need to be validated.
D. Management Approach (met the minimum of 1, 3)
(1)
<ul style="list-style-type: none"> • Proposes an Agile approach.
E. CCWIS Hosting (met the minimum of this section)
<ul style="list-style-type: none"> • Proposed solution will be cloud hosted. • Offers an offline mobile connection • Indicated a Virtual Private Network connection would be required to access the system when not mobile.
F. CCWIS Technical Requirements (met the minimum of 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13)
(2)
<ul style="list-style-type: none"> • Proposed solution includes fully embedded Structured Decision Making. • Dashboard shows all members of a multidisciplinary team. • Financial management shows a robust structure. • Proposes integration with the State's active directory.
(10)
<ul style="list-style-type: none"> • Proposes utilizing NCCD's Safe Measures Reporting.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: International Business Machines Corporation (IBM)

DATE: June 24, 2019, June 27, 2019, July 9, 2019

<ul style="list-style-type: none"> • Indicated leveraging reports that have already been developed for other jurisdictions. • Robust reporting dashboard. • Proposed solution includes artificial intelligence capabilities and analysis on unstructured data.
(13)
<ul style="list-style-type: none"> • Provided a definition of the plans but not how they would be implemented.
G. Operations and Maintenance (met the minimum of 1, 2)
H. Software Ownership and Application Transfer (met the minimum of 1, 2, 3)
I. Staffing Requirements (met the minimum of 1, 2, 3, 4, 5, 6, 7)
(6)
<ul style="list-style-type: none"> • Subject Matter Expert has direct field experience work in Child Welfare. • Proposed team demonstrates direct experience working with the proposed solutions.
2. Initial Performance Period Summary Level Plan
<ul style="list-style-type: none"> • Did not identify program development or implementation tasks, the month they would be carried out or the resource responsible for each task.
3. Technical Solution – Including Licensing and Integration Information (met minimum requirements)
Demonstrations:
<ul style="list-style-type: none"> • The proposed solution will auto-populate participant history within the intake module. • The proposed solution is case worker centric with intuitive workflows and streamlined dashboards. • Mobile functionality is robust and sophisticated.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER: International Business Machines Corporation (IBM)

DATE: June 24, 2019, June 27, 2019, July 9, 2019

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25

Score: 14.08

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$36,419,087.00	÷	\$64,687,349.21	x	25 points	=	14.08

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER: Infosys Public Services
DATE: June 24, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services
NAME OF RFP COORDINATOR: Deb Downer
NAMES OF EVALUATORS: Robert Blanchard, Jenny Dillihunt Brown, Gina Googins, Jenna Joeckel, Daniel Lynch, Gilman Ouellette, Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 		X*
<p>* Based on the projects provided in Appendix C, the Bidder failed to demonstrate the eligibility requirements as outline in Part I.C. of the RFP. Therefore, the Bidder is disqualified at Stage One.</p>		

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER: KPMG LLP
DATE: June 24, 2019

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Health and Human Services
NAME OF RFP COORDINATOR: Deb Downer
NAMES OF EVALUATORS: Robert Blanchard, Jenny Dillihunt Brown, Gina Googins, Jenna Joeckel, Daniel Lynch, Gilman Ouellette, Hazel Stevenson

SUMMARY PAGE

Pass/Fail Criteria		
Stage One - Part I.C. Eligibility to Submit Bids	Pass:	Fail:
<p>All interested parties who can provide a CPS management system that has been implemented and is currently in production use in a state setting within the past five (5) years are invited to submit bids in response to this Request for Proposals. The CPS Management System must include, at minimum, the following set of configurable Modules or services:</p> <ol style="list-style-type: none"> 1. Intake: Recording information on reports of child abuse and neglect; 2. Investigation: Investigating reports of abuse and neglect; 3. Assessment: Assessing family for child safety; 4. Service Planning: Interim and long-term service planning; 5. Case Management: Recording details of encounters and other case- and court-related activities; 6. Financial Management: Processing and recording payments for services for children and families served by OCFS, including Title IV-E eligibility; 7. Reporting: Federally required, Pre-defined, and ad hoc reporting used by caseworkers, caseworker supervisors, and managers; and 8. Resource Management: Managing and utilizing foster care placement and service resources. 	X	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201904061
 RFP TITLE: Maine Comprehensive Child Welfare Information System
 BIDDER: KPMG LLP
 DATE: June 24, 2019

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

Total Points Available: 30 (minimum 18) Score: 15.00*

Evaluation Team Comments:

Part IV.B. Section I
1. Overview of the Organization (met the minimum for this section)
<ul style="list-style-type: none"> • Indicated experience working within Child Welfare, in multiple states, however did not demonstrate direct experience implementing a CCWIS system. • Experience working with the Department on the ACES Rules Engine project which was implemented on-time. • Recently fined by the Security and Exchanges Commission for audit fraud. • It is unclear what the Bidder's role was in the Indiana project or what the relationship with Casebook was at the time of implementation. • It is unclear what Project 1 State reference contact person's affiliation with the State of Indiana is currently, since the reference resigned in 2012. • Experienced with Agile methodologies.
2. Subcontractors (met the minimum for this section)
<ul style="list-style-type: none"> • Proposes utilizing 6 subcontractors: Casebook, Portland Webworks, Diona, Northwoods, Maine Information Network and Mathematica. • Casebook is the proposed solution, which has been implemented in Indiana. The Team is concerned the proposed solution would be dependent upon this subcontract continuing for the life of the system. • The Bidder indicates Diona and Northwoods would provide optional services.
3. Organizational Chart (met the minimum for this section)
<ul style="list-style-type: none"> • It is not clear how the proposed subcontractors integrate with the Bidder's organizational chart. • The organizational chart does not identify architect positions.
4. Litigation
<ul style="list-style-type: none"> • The Bidder did not provide a list of all current or closed litigation within the past 5 years, as required by the RFP.
5. Financial Viability
<ul style="list-style-type: none"> • The Bidder did not provide a Comprehensive Dun and Bradstreet Comprehensive Insight Plus Report. • Provided a bank reference and a letter from a surety company.
6. Licensure/Certification (met the minimum for this section)
7. Certificate of Insurance (met the minimum for this section)
<p>*Based on the Evaluation Teams consensus score for this section, the Bidder did not receive the minimum score of 18 as outline in Part V.B.2. of the RFP. Therefore, the Bidder is disqualified at Stage Two.</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 17, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
<ul style="list-style-type: none"> • Over 100 U.S. federal agency clients and nearly 200 state and local government clients (including the State of Maine DAFS) • Has worked in Child Welfare with 15 States and in 4 CCWIS projects • Qualifying Project OHIO
2. Subcontractors
does not plan to use any subcontractors to deliver proposed services.
3. Organizational Chart
Provided
4. Litigation
Provided
5. Financial Viability
Overall assessment of this organization over the next 12 months: VERY STABLE CONDITION Based on the predicted risk of business discontinuation: STRONG LIKELIHOOD OF CONTINUED OPERATIONS
6. Licensure/Certification
Provided
7. Certificate of Insurance
Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 17, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
<ul style="list-style-type: none"> • Waterville, Maine • partnerships with Colby College, Thomas College and Kennebec Valley Community College
B. CCWIS Functionalities and Priorities
<ul style="list-style-type: none"> • EmpowerME solution • transfer approach • leveraging an in-production Child welfare system that includes functionality from intake through financials and a rapid application development approach • leveraging elements of the West Virginia CCWIS solution currently being implemented • CCWIS Solution within 20 Months • Hybrid Agile delivery methodology • Human Centered Design (HCD) principles • mature and stable state
C. CCWIS Document Repository Expectations
SharePoint site
D. Management Approach
Hybrid Agile approach Need dedicated Product Owners (or State functional experts) Management Plans within the first 30 days of the Initial Period of Performance
E. CCWIS Hosting
<ul style="list-style-type: none"> • on-premise at OIT facilities • current work with DAFS, are familiar with the OIT ecosystem
F. CCWIS Technical Requirements
<ul style="list-style-type: none"> • Addressed all areas • OHIO structure seems similar to Maine- though OHIO is County based • SDM tools • Automated Title IV-E • analytical tools including Tableau and Cognos • training experience
G. Operations and Maintenance
<ul style="list-style-type: none"> • Answered all questions
H. Software Ownership and Application Transfer
CGI has supported license transfers amongst states
I. Staffing Requirements
<ul style="list-style-type: none"> • Seems appropriate based on RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 17, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Limited Agency staff requirement
2. Initial Performance Period Summary Level Plan
• a go-live within 20 months, followed by a 10 month enhanced maintenance period
3. Technical Solution – Including Licensing and Integration Information
• Answered all questions
• CGI has developed exchanges for Medicaid and the Courts systems to support the Agency program needs.
• Tool seems to have a refined workflow.
• Staff seem qualified

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: 6/20/19

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization - 35+yrs complex systems integration, 25yrs w/statewide Child Welfare applications. CCWIS work w/CA, OH, WV & CO
2. Subcontractors – None proposed
3. Organizational Chart - Provided
4. Litigation – 3 closed cases listed
5. Financial Viability – Dun & Bradstreet Comprehensive Insight Plus report, Bank of America Letter of Reference, Letter of Bondability provided
6. Licensure/Certification – ISO, CMMI
7. Certificate of Insurance – Certificate of Liability Insurance attached

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: 6/20/19

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements – Existing technology center in Waterville, ME
B. CCWIS Functionalities and Priorities – Replaces MACWIS w/a potential in-production Child Welfare system: intake-financial. Mobile capability - I Claim to deliver CCWIS solution in 20mos – P Set of self-contained functionality configured based on modules identified in RFP process to satisfy Department’s needs Complies w/ACF CCWIS requirements (federal)
C. CCWIS Document Repository Expectations Will utilize Sharepoint Suggests DHHS/OIT host the repository on premise in State Data Center, no per user cost
D. Management Approach Proposed Hybrid Agile approach – allows rapid solution prototyping per business need Client Partnership Management Framework (CPMF) – risk management @ core Project management plans to measure/track key results (customizable)
E. CCWIS Hosting - Proposed on-premise hosting @ OIT facility
F. CCWIS Technical Requirements – CGI will track & confirm compliance w/Requirements Validations, Requirements Traceability and User Acceptance Testing & will help DHHS w/review, assessment & reconciliation & will prepare compliance plan to support DHHS’ preparatons for federal review Provides staff management, security management, doc generation, doc management, mobility (can complete tasks on tablet/smartphone),
G. Operations and Maintenance Provide services to support Help Desk & future enhancement Software allows addition of future add ons w/rapid deployment of changes Human Centered Design framework (HCD)
H. Software Ownership and Application Transfer CGI will assist with licensure process At end of term of service, will provide tech, business & project support during transition
I. Staffing Requirements – List of lead employees w/experience provided. Resumes attached.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: 6/20/19

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

2. Initial Performance Period Summary Level Plan – ME CCWIS proposed timeline provided
3. Technical Solution – Including Licensing and Integration Information – Proposed transfer of the OH solution

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 17, 18 and 19, 2019

EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization - P experience in child welfare systems, agile, mobile. 15 states and using Ohio. Met also shows extended services. 35 years of government work. Worked with Maine Advantage.
2. Subcontractors - N/A states none
3. Organizational Chart - have a project manager, not seeing trainer named identified. Not seeing a subject matter expert.
4. Litigation – I 2012 tort action claiming defamation and intentional interference, dismissed with prejudice 2016 2016 two counts against CGI, dismissed with prejudice 2018 subcontractor filed a lawsuit due to funds being wired into wrong email account. 2019 case was settled.
5. Financial Viability – met
6. Licensure/Certification - yes
7. Certificate of Insurance - yes

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 17, 18 and 19, 2019

EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements - based out of Waterville, where they currently have an office.
B. CCWIS Functionalities and Priorities – EmpowerME solution program, can provide data reports, smart mobile capability, financial capabilities. Q – is it in production or actually a program. Experience in working with Ohio Child Welfare system, state will be able to deliver working software on day one. Can replace the legacy system and comply with CCWIS requirements, 20-month timeframe with 10-month enhancements and maintenance. Q – states experienced staff in Child Welfare and use of EmpowerME, yet this is in production? States can migrate legacy data. - ability to use already designed software to offset design time and cost. I – screen designs, M – use of ticklers. Q – photos, uses Tableau. States uses SDM tools from NCCD. NEICE compliant/compatible. Track user information and data access. Ease of making necessary changes. Q – what the CCWIS system will look like at various modules.
C. CCWIS Document Repository Expectations - SharePoint
D. Management Approach – Hybrid agile approach, detailed plan on moving the process forward, including state team in this flow of movement.
E. CCWIS Hosting – housed within OCFS/OIT. Not cloud hosting. Allows for work with OIT.
F. CCWIS Technical Requirements – P - keeps track of involvement, mobility, reporting and data collecting. M – training, professional development. Supports SDM functions/tools in assessment, case. Q – not seeing electronic discovery for courts, scanning ability and filing automatically. Sharing of agencies showing near real time.
G. Operations and Maintenance - hosted at the OIT center. Department owned, backup and recovery, help desk within hours expected. Email access 24/7
H. Software Ownership and Application Transfer - P owed by state.
I. Staffing Requirements - M – not seeing CW experience in the field. Q Experience.
2. Initial Performance Period Summary Level Plan - P

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 17, 18 and 19, 2019

EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

3. Technical Solution – Including Licensing and Integration Information – states meets CCWIS requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 19, 2019

EVALUATOR: Jenna Joeckel

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization - >35,000 users, 35 years gov complex system integration, 25 yrs experience statewide child welfare apps, Waterville location, founded 1976, publicly owned 150 project staff, Ohio West Virginia, Colorado, California, Wisconsin, Alaska.
2. Subcontractors - None
3. Organizational Chart - present
4. Litigation no material adverse impact on contract performance, 2012-defamation and intentional interference – dismissed w/ prejudice 2016-breach of contract and negligence – settlement paid 2018-spoofing - settled
5. Financial Viability Business risk-low, delinquency score 60, 73,000 employees, good standing accounts for 16 years
6. Licensure/Certification ISO9001, ISO 14001, ISO 27001, ISO 20000
7. Certificate of Insurance - present

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: June 19, 2019

EVALUATOR: Jenna Joeckel

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements – Waterville Technology Center Top 10 IT services provider in Waterville
B. CCWIS Functionalities and Priorities – flexible, smart mobile capabilities, no multiple pages to access information, Human centered design-access information quickly, opening multiple pages, mobile capacity, 20 month initial, 10 month maintenance, EmpowerME, Business rules are effectively dated so they can be pre-staged to take effect when a new policy or regulation is implemented., Hybrid Agile delivery methodology, genogram module
C. CCWIS Document Repository Expectations SharePoint site will be used for document management-no incremental per user cost. Office 365 Integration
D. Management Approach Transparency, rapid delivery, and continuous improvement. Rapid solution prototyping driven by business needs but also maintain management control of the project. Including CGI Child Welfare Experts (SMEs), Client Partnership Management Framework – certified.
E. CCWIS Hosting OIT , Not included estimates for storage, on site hosting, bi-directional interfaces SDLA environments and utility environments,
F. CCWIS Technical Requirements Requirements Validations, Requirements traceability, User acceptance testing, will prepare a CCWIS compliance plan Security Profiles Cognos to generate case forms, Docuware for doc management, mobility from smartphones and tablets, Model Driven Architecture Approach, includes state staff portal and contractor portal, source-version control system, n-tier model that allows for scalability and reliability, Home vs Private Providers
G. Operations and Maintenance Stores all data within the United States
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information Go live in 20 months SDM tools? Additional allegations can be added. Ticklers-overwhelming? Red, yellow, green?? Checklists can upload documents?/ to where??Investigation vs. assessment.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: 6/21/2019

EVALUATOR: Daniel Lynch

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
p-experience with State of Maine (Advantage)
p-Waterville Delivery Center
p-experience with CCWIS (Ohio, Colorado, others)
2. Subcontractors
i-CGI will not use subs.
3. Organizational Chart
p-appears well thought out from business to technical
4. Litigation
p-identified recent litigations with impact (none) and standard "ongoing."
5. Financial Viability
i-all dollar amounts are in Canadian Dollars (CAD)
p-D&B current (5/10/19) Rated as ER1
p-low risk "Very stable;" Stable Leadership
p-Excellent D&B review (95 Failure; 2 Viability) Max credit: \$1.8M
p-Bank Ref
p-Surety bond for total of project
6. Licensure/Certification
p- ISO, CMMI (Level 5)
7. Certificate of Insurance
p-Complete: \$1M General liability, Workman's Comp, Professional; \$5M Prof Liability, Cyber liability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
p-Use of current Waterville Center
p-limited local competition for resources
B. CCWIS Functionalities and Priorities
p-import OH's current CWS with addition of WV's CCWIS solution
p-proven software from beginning w/full in 20 months
p-additional 10 mos enhancements and maintenance
p-planned ongoing O&M after enhancement phase
q-cost effectiveness vice straight COTS or SaaS, which require longer support?
p-delivery plan seems logical and well thought out
p-Human Centered Design for mobile development/use
i-data migration to be developed
C. CCWIS Document Repository Expectations
i-Sharepoint for doc mgt
i-State Data Center will host project
p-Office 365 integration
D. Management Approach
p-Use of CW SME's across teams
p-initial management plan scope
E. CCWIS Hosting
p-On premise w/OIT (more cost effective, experience with OIT (Advantage))
i-costs do not include estimates for storage
F. CCWIS Technical Requirements
p-Develop CFR compliance plan
p-Admin functionality plan included
p-Title IV-E determination to include links for payments (includes recon)
q-Will experience with Advantage be beneficial?
p-well thought interfaces (MaineCare, Fire Marshalls, etc) Shows extensive knowledge
p-leverages experience w/multiple states ensuring fed/state reporting requirements
p-mature training plans/interfaces
G. Operations and Maintenance
p-On-premise data hosting; no transfer or security issues
p-disaster recovery/continuity of operations plan
p-Help desk/support plan
H. Software Ownership and Application Transfer
p-on premise with updates prior to xfer

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I. Staffing Requirements
p-six members id'd; RFP plus 3, including solution and data architects
p-All 10 Job Descriptions
q-footnote on page 106??
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services

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Individual Evaluator Comments: **Notes Taken on 6/22//2019 Section I**

Part IV.B. Section I
1. Overview of the Organization
35,000 users, they have market sector experience through implementations, transactions processing, partnerships, and system integrations related to Child Welfare Systems in Ohio, Wisconsin, Colorado, West Virginia, California, and Alaska. Founded in 1976 (43 years) (25 years Child Welfare experience).73k employees. They indicate 1,200 here (not sure if here means Maine or US as they are global). They have a ME presence with the AdvantageME solution and created local jobs by opening the Waterville Delivery Center in 2016. They show agile methodologies experience with the Colorado and West Virginia legacy system replacement projects. They have current engagements with 5 states. Their project examples include: Project 1. The State reference, OHIO SACWIS transition to CCWIS, is an ongoing series of enhancement with a contract term ending in 2021. The major functional modules implemented include the services we are looking for. A project overview was given as well as CPS system capabilities which include mobile enabled, a reusable model-based case management framework that can be used for other case management needs such as adult protective services. The solution allows for federal data collection, maintenance and reporting, which in turn allows them to maximize federal funding for Title IV-B and IV-E programs. The solution includes the National Electronic Interstate Compact Enterprise (NEICE) data exchange It is an on-premise managed solution. Project 2. The State of Colorado SACWIS system, also known as TRAILS showcases their agile methodology development approach on a .Net framework with reusable components. Project 3. The State of Maine AdvantageMe financial management and procurement system with the State Controller's Office. They provide on-going system enhancements and support and have an extended contract until 2026. All three include contact person, phone number, and e-mail address.
2. Subcontractors
CGI does not plan to use any subcontractors to deliver proposed services.
3. Organizational Chart
The Org Chart is project centric and is headed by the Executive Sponsor. The Project Manager has the ultimate accountability to the Executive Sponsor. Most areas of the project life cycle are covered but there is no organizational development/change management lead as part of the team. Staff are only identified by title, not name.
4. Litigation
They list 3 litigations where they are named.
5. Financial Viability

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DEPARTMENT: Health and Human Services

D&B Comprehensive Insight Plus Report Summary is Provided. As this is not one of my strength areas, I reserve comment at this time. The Bank Reference was provided. They provide a surety letter from Westchester Fire Insurance Company stating they would consider a request for the above-mentioned project and for CGI Technologies and Solutions Inc. to provide a payment and performance bond.
--

6. Licensure/Certification

CMMI Level 5, ISO 9000, 14001, 27001,2000

7. Certificate of Insurance

ACORD Certificate of Liability Insurance provided with evidence of General and Professional liability. They remark in the "Description of Operations/Locations/Vehicles" that the Cyber and Network Liability insurance is covered as part of the professional liability
--

**STATE OF MAINE
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DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services

Part IV.B. Section II Notes Taken on 6/23//2019 Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
CGI Plans to base project activities in their Waterville, Maine Technology Center. The proximity will allow for both face to face and remote project meetings and sessions
B. CCWIS Functionalities and Priorities
CGI proposes a solution that leverages their Client Partnership Management Framework and would transfer the current child welfare solution from OHIO as well as leverage elements of the West Virginia CCWIS solution. They propose naming the solution EmpowerME It would be a web-based child welfare solution available day one. Their proposal calls for 20 months of the initial period of performance followed by 10 months of enhancements and maintenance. Why the need for 10 extra months? Why wouldn't all requirements be captured and implemented as part of the initial 20-month implementation? They are proposing an on-premise hosting, utilizing OIT service catalogue technologies and security standards. And will manage the project using a hybrid Agile delivery method. The solution is a child welfare case management system that will be configured to include the modules we identified in our RFP and will comply with ACF CCWIS requirements in CFR 1355.50-59. The solution is a transfer of an existing system leveraging elements from a separate implementation. They propose a hybrid Agile which appears to be a waterfall methodology with iterative components within the project delivery phases. The solution is optimized for mobile use utilizing HTML 5 and CSS3 in their web page design. The User interface is based on Human Centered design.
C. CCWIS Document Repository Expectations
The assumption is that they will create SharePoint site (EmpowerMe Project Repository) available to state staff for the full lifecycle of the contract at no cost hosted by DHHS and OIT on-prem in the State Data Center and will comply with OIT, Security and Operational standards.
D. Management Approach
They propose a hybrid agile management approach via their Client Partnership Management Framework (CPMF), which appears to be a traditional waterfall approach with some agile methodology). This model would work.
E. CCWIS Hosting
They propose to host the EmpowerMe solution on premise at OIT facilities, leverage existing infrastructure and service capabilities. The thought is that this will give us increased control over TCO, Information resources, and performance and availability of the CCWIS. Should Maine charter CGI to add a module, they will work with OIT to review and agree upon an action plan. This plan would be an easy implementation from an infrastructure perspective. They also include a remote hosting. They include a remote hosting option should we want to add a module to the EmpowerMe solution. I am not sure why new modules wouldn't be hosted on premise.
F. CCWIS Technical Requirements

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DEPARTMENT: Health and Human Services

<p>They share quite a lot in the section that on first blush appears to satisfy our asks. Of note: they provide a logical view diagram that promotes virtualization the environments. (There are cost savings associated with the model). This will require a review with our network, security and data teams to understand the EmpowerMe environments and flush out the requirements. They also provide a Solution Interface Data Flow Diagram and Relationship context map between EmpowerMe and legacy systems. Storage would be discussed at project startup, but I think storage should be part of the project cost analysis. Reporting is done through the Cognos Data Warehouse and they can integrate with our current instance of Docuware. They have a decent implementation plan</p>
<p>G. Operations and Maintenance</p> <p>CGI proposed that the EmpowerMe solution be hosted on-premis in the OIT Data Center. Their plan includes the following O&M areas: System Overview, O&M roles and responsibilities, Operation procedures, Data and Database Administration, and Configuration Management. They also provide visual tiered Service Delivery Framework diagram this is part of their current engagement tool set.</p>
<p>H. Software Ownership and Application Transfer</p> <p>They will work with us as needed to establish our application software license per 45 CFR 95.617 and section 1355.52(h) of the ACF CCWIS regulation. They will collaborate with us on needed materials. CGI will work with SOM to transfer control and responsibility for the application services to the department or an alternate provider, upon receipt of a written intent of termination</p>
<p>I. Staffing Requirements</p> <p>They will work with OIT to build and integrated security and privacy compliance plan for the engagement. Their job descriptions are provided in attachment 10 for the following key personnel roles: Project Manager, Business subject matter expert, Business Analyst (functional lead), Solution Architect, Data Architect, and Technical Lead. They provide job descriptions in attachment 10 and resumes for all key personnel in attachment 11. Yogi Ganesan PMP has previous experience with the State of Maine. He was part of the Maine ACES ACA enhancement project in 2013-2014. All others have some experience working with state governments and all would be full time on the project.</p>
<p>2. Initial Performance Period Summary Level Plan</p> <p>Their approach looks to rapidly define the requirements and design and build out the required functionality iteratively for efficiency, transparency, and quality throughout the project. (needs discussion). They layout out a plan that commences on 08/15/2019 and deploys 05/21/2021. Their plan allows for a go live within 20 months and a 10-month enhanced maintenance period. Given their experience, I would think they would have already encountered what they propose for the 10-month enhanced maintenance period and have that included in the work that is part of the initial 20 months deploy.</p>
<p>3. Technical Solution – Including Licensing and Integration Information</p> <p>They provide quite a bit of information in this section around the CCWIS pertinent technical requirements and solutions Their proposed solution includes the transfer of the Ohio transitional work plus elements from the Tennessee, Michigan and West Virginia to Maine and will include most of the CCWIS requirements that have already been implemented through their previous engagements. Any requirements not captured through the transfer will be configured as part of our engagement. They</p>

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provided screens shots for the major modules that will be part of the EmpowerMe implementation

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RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: CGI Technologies and Solutions, Inc.

DATE: 6/18/19 & 6/24/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

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Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
National leader – 35K users, 35 years in Gov / 25 years Child Welfare exp; decades with DAFS-ADVME in OH: 2.6 billion transactions, \$3.7B in payments in CO CCWIS-compliant in production in WV – subcontractor, in process of implementing CA- sub contractor, agency readiness mature organization, broad IT capabilities CMMI and ISO certification Exp integrating CCWIS compliant modules, Agile, transition from SACWIS to CCWIS Exp on-prem at OH Exp with Managed application at ME 3 references provided. Project 1 – OH- transitional CCWSIS solution Project 2 – CO- legacy modernization Met requirements P – mature organization, depth of experience in Child support, similar successful projects, government including ME experience, roles as sub-contractor bring strength in organizational readiness.
2. Subcontractors
Not using
3. Organizational Chart
Provided, comprehensive team P includes executive sponsor and architects
4. Litigation
Provided. Appealed / settled several cases. CGI does not expect any pending to have material adverse effect
5. Financial Viability
Bond in file 3 P -D&B – very stable, low risk of failure, 73K employees
6. Licensure/Certification

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DEPARTMENT: Admin and Finance

P - ISO9001 – project management framework, ISO 27001 – security, ISO 20000 IT service management CMMI level 5 and level 3 in several US, India and Europe centers
7. Certificate of Insurance
Provided, includes cyber and network liability \$5M, dated 6/1/19-6/1/20

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DEPARTMENT: Admin and Finance

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Base in Waterville, ME. Partner with colleges to leverage research and innovation.
B. CCWIS Functionalities and Priorities
Transfer approach of OH system leveraging WV elements. iterative delivery. Replace MACWIS within 20 months, with 10 months enhancements to fine tune on-prem hosting Hybrid agile – multiple teams P Project accelerators User interface – Human centered Design Use lessons learned for data conversion
C. CCWIS Document Repository Expectations
Sharepoint - host on prem
D. Management Approach
Methodologies that align with existing governance and approval processes CPMF – ISO 9001 certified, uses templates
E. CCWIS Hosting
On-prem, leverage capabilities, suggest more cost effective and stronger controls Multiple logical environments
F. CCWIS Technical Requirements
addresses requirements P Track and confirm in 3 streams: Validation, traceability, verification CCWIS compliance plan integrate with Docuware COGNOS reporting NCCD model for assessments AD – LPADP API to authenticate until IAM/SSO available NIST 800-53 alignment Existing outlook integration data classification conducted for HIPAA requirements P -Show understanding of OIT policy requirements Leverage integration platform with SOA and Moveit P- vendor for Advantage ME P experience with Medicaid eligibility 6 concurrent team approach – can the Department resource for this? P Change process based on ITIL guidelines / JIRA P baseline solution has over 200 reports developed Datamart integrated with Tableau and COGNOS

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<p>Oracles golden gate data replication Informatica for ETL P- detailed training methodology, uses previous experience</p>
<p>G. Operations and Maintenance P- standardized, develop SLA and embed in plan, based on framework P_ work with OIT and leverage OIT security scanning; perform independent vulnerability assessment, use OIT services for DR</p>
<p>H. Software Ownership and Application Transfer Supported license transfers between states</p>
<p>I. Staffing Requirements Team has experience in child welfare and aligns with requirements OIT resources under estimated – need role clarification P Key staff have Project management and SACWIS experience, modernization and architecture M – no direct experience with OH or WV</p>
<p>2. Initial Performance Period Summary Level Plan Page 174, does not address responsibility</p>
<p>3. Technical Solution – Including Licensing and Integration Information Meets requirements tabular mapping to CCWIS requirements P- rapid requirements definition validates requirements and used in other states P transfer system in use in multiple states and being enhanced in WV M – not clear how bidder will “work with OIT” at platform level M- technical architecture doesn’t describe hosting platform</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Lynex

EVALUATOR DEPARTMENT: DHS SC

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- Demonstrate any automated case worker activities:
 - Communications - Able to broadcast
 - Reminders
 - Calendar Appointment
 - Dashboards - Good for overdue/coming up

SADY Maloney
exec sponsor

- Demonstrate field activities being complete on the mobile platform of the solution:
 - Collect signatures - Adobe Farnar
 - Receive documents - native scan
 - Complete or review a plan/assessment/release of information
 - Offline activity - Implementing w/ OH. Will work w/ ME for required portion
 - Service authorization - Fin Summary

- Demonstrate decision making tools in your system.
- Safety
Risk

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

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RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Dan Lynch

EVALUATOR DEPARTMENT:

• Demonstrate how the system supports Court activities:

- Interface CASE MODULE → working on
- Keep track of and notify case worker of upcoming hearing - can occur on pending actions
- Produce discovery
- Support redaction of documents - native to Adobe
- Produce court notifications - create & produce

• Demonstrate how the electronic document management function integrates with the system:

- Entry - Security for Services
- Storage
- Export
- Recall Access for App

• Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents. *TRNG Documentate → Licensing (Integrated)*

- Collects WE info
- interfaces w/ state Acctg system - generate payment.
- Maintain total payment history

• Give an example of how supervisors can use data collected to make decisions.

**STATE OF MAINE
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BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: *Dan Lynch*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">o Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<i>u/records (pg 2)</i>
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Gina Gougeon

EVALUATOR DEPARTMENT:

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Sandy Malone OHC process

<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
<p><i>Shows - upcoming activities, data gathered - not seen reports? Supervisor overview of case</i></p>
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> • Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity → <i>Don't have yet. need to develop for mobile</i> ○ Service authorization - <i>like \$ in the case for easy view</i>
<p><i>Wants w/ DocuSign to capture electronic sig, currently using Adobe Scanning app a lot of clicking back and forth</i></p>
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system. <p align="center"><i>SAM?</i></p>

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BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Gina Grogins

EVALUATOR DEPARTMENT:

Add

- Demonstrate how the system supports Court activities:
 - Interface
 - Keep track of and notify case worker of upcoming hearing
 - Produce discovery - Did not do - can not do - would be a book
 - Support redaction of documents
 - Produce court notifications

In Ohio → TANF support entry, maintenance - Access for us
 no interface at court but will work with us/courts
 - Just like MACWIS -
 - Court calendar - will pull all cases into calendar
 Redaction - Staff time -

- Demonstrate how the electronic document management function integrates with the system:
 - Entry - completed
 - Storage -
 - Export
 - Recall

entry seem completed as goes to dest. typ -

- Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.

Shaved School, can't search
 Behaviors of child / needs -
 limited training NO webbased train
 for resource providers.
 Not as advanced as our current system

- Give an example of how supervisors can use data collected to make decisions.

Shaved in the begin how sup can view
 calendar but did not show reports being
 built.

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EVALUATOR NAME: Gina Grogins

EVALUATOR DEPARTMENT:

- Demonstrate analytic tool specifically the ability to develop ad hoc data.
 - Example - Tracking placements of children

has sam tool - clear -

- Demonstrate operability with financial management system.

stated how we capture

- Staff professional development tracking training, conferences, performance management

Did not get to this.

- Other Observations:

- lots of tabs and boxes hard to tell what is/is not filled out
- forced approval/action to be done

**STATE OF MAINE
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BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Jenna Joeekel

EVALUATOR DEPARTMENT:

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<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
<p>Supervisor screens Supervisors can assign priorities Alerts - upcoming events Safety Assessment Family Assessment Ongoing case assessment</p> <p>Intake narrative page remains Badges - DV, teen parent</p>
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization
<p>Electronic Signature - Docu Sign Implementation? Scan documents w/ tablet + store into library. case plan - PDF format currently implementing offline activity - what elements? would be needed.</p> <p>Adobe is integrated.</p>
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
<p>PiSE Assessment - radials Strengths / Needs</p>

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BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Jenna Joeckel

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none">○ Interface○ Keep track of and notify case worker of upcoming hearing○ Produce discovery○ Support redaction of documents○ Produce court notifications
<p>Legal actions - document court activity. All court hearings on calendar - can pull up. Can Mark words for redaction</p>
<ul style="list-style-type: none">• Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none">○ Entry○ Storage○ Export○ Recall
<p>Document List</p>
<ul style="list-style-type: none">• Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
<ul style="list-style-type: none">• Give an example of how supervisors can use data collected to make decisions.
<p>Approval history.</p>

**STATE OF MAINE
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BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Jenna Joeckal

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
Entire payment lifecycle -
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:

Bob Blanchard

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME:

EVALUATOR DEPARTMENT:

Instructions: The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

<ul style="list-style-type: none">• Demonstrate any automated case worker activities:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Communications<input type="checkbox"/> Reminders<input type="checkbox"/> Calendar Appointment<input checked="" type="checkbox"/> Dashboards
<ul style="list-style-type: none">- Messaging services available at multiple levels- Work tracking with hyperlink access- email routing
<ul style="list-style-type: none">• Demonstrate field activities being complete on the mobile platform of the solution:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Collect signatures<input checked="" type="checkbox"/> Receive documents<input checked="" type="checkbox"/> Complete or review a plan/assessment/release of information<input checked="" type="checkbox"/> Offline activity<input checked="" type="checkbox"/> Service authorization
<ul style="list-style-type: none">- Capture Signatures through Adobe- Pictures stored right into application- Offline activities in development- Present App outside of Case management
<ul style="list-style-type: none">• Demonstrate decision making tools in your system.
<ul style="list-style-type: none">- Incorporated Tools- Require complete documentation prior to setting to approval

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Bob Blanchard

EVALUATOR DEPARTMENT:

- Demonstrate how the system supports Court activities:

- Interface
- Keep track of and notify case worker of upcoming hearing
- Produce discovery
- Support redaction of documents
- Produce court notifications

- Create Court Calendar
- manual redaction in Adobe - Search & Revert

- Demonstrate how the electronic document management function integrates with the system:

- Entry
- Storage
- Export
- Recall

- Person / Plaintiff / Provider / case / Activity
- Security Attribute identifiers
- Browse to file to upload - for Pic / file / Scan
- Fileset

- Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.

Not sure licensing process is incorporated based on comment #6
"System can integrate with licensing system"

- Give an example of how supervisors can use data collected to make decisions.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: *Bob Blanchard*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<ul style="list-style-type: none">- MACLIS language used- generate pay mts- over-payment / underpayment Adjustments
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Jenny Dillihunt Brown

EVALUATOR DEPARTMENT: OCFS

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

- Demonstrate any automated case worker activities:
 - Communications
 - Embedded in solution
 - Reminders
 - Ticklers
 - Calendar Appointment
 - Dashboards
 - Determined by role (caseworker, supervisor, etc.) and module (Intake, Case, Investigation, etc.)

- Demonstrate field activities being complete on the mobile platform of the solution: (note: presentation given on iPad tablet)
 - Collect signatures
 - Utilizes Adobe tools, which allows collection of electronic signature on tablet
 - Receive documents
 - Case notes feature allows the scanning of a document in the field & save to "library." ? if attached to specific case or in general "library." ? how retrievable
 - Complete or review a plan/assessment/release of information
 - Offline activity
 - In development, propose tailoring these activities to ME
 - Service authorization
 - Available within solution (shows pending and approved)

- Demonstrate decision making tools in your system.
 - Integrated Structured Decision Making (SDM) tool

- Demonstrate how the system supports Court activities:
 - Interface
 - Not currently enabled/available
 - Keep track of and notify case worker of upcoming hearing
 - Depends upon user entering information into solution
 - Provides a "court calendar"
 - Produce discovery
 - Not currently enabled/available

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Jenny Dillihunt Brown

EVALUATOR DEPARTMENT: OCFS

<ul style="list-style-type: none">○ Support redaction of documents<ul style="list-style-type: none">○ Within PDF file, can select specific names/phrases and redact as desired○ Produce court notifications
<ul style="list-style-type: none">● Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none">○ Entry○ Storage<ul style="list-style-type: none">○ Can be specific to individual or case○ Export○ Recall
<ul style="list-style-type: none">● Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.<ul style="list-style-type: none">● Can restrict by county or school district, child's characteristics, etc.● Ability to document recruitment plans/activities, inquiry, training, contracts, agency certifications, etc.
<ul style="list-style-type: none">● Give an example of how supervisors can use data collected to make decisions.
<ul style="list-style-type: none">● Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">● Demonstrate operability with financial management system.<ul style="list-style-type: none">● Interface exists in current functionality
<ul style="list-style-type: none">● Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">● Other Observations:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER NAME: CGI Technologies and Solutions Inc.
DATE: July 9, 2019
EVALUATOR NAME: Hazel Stevenson
EVALUATOR DEPARTMENT: Admin and Finance

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
Dashboard shows workflow and hyperlinks to case Badges to alert workers Edit warnings provided on page for worker
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization
Generate report produces pdf or excel, in viewer, using Adobe for client to sign on tablet. Use tablet features to receive document eg scan document Non production – implementing offline function in other states, will determine what is needed for SoM not fully available all functions.
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
<ul style="list-style-type: none"> • Demonstrate how the system supports Court activities: <ul style="list-style-type: none"> ○ Interface ○ Keep track of and notify case worker of upcoming hearing ○ Produce discovery ○ Support redaction of documents ○ Produce court notifications
Use Adobe for redaction
<ul style="list-style-type: none"> • Demonstrate how the electronic document management function integrates with the system: <ul style="list-style-type: none"> ○ Entry

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

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BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Hazel Stevenson

EVALUATOR DEPARTMENT: Admin and Finance

<ul style="list-style-type: none"> ○ Storage ○ Export ○ Recall
<p>Integrated in workflow eg intake process Security attributes for documents – check boxes for higher degree of security Store metadata i.e. link to Filenet where document is stored</p>
<ul style="list-style-type: none"> • Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
<ul style="list-style-type: none"> • Give an example of how supervisors can use data collected to make decisions.
<ul style="list-style-type: none"> • Demonstrate analytic tool specifically the ability to develop ad hoc data. <ul style="list-style-type: none"> ○ Example – Tracking placements of children
<ul style="list-style-type: none"> • Demonstrate operability with financial management system.
<p>Payment lifecycle – interface to accounting system for payments</p>
<ul style="list-style-type: none"> • Staff professional development tracking training, conferences, performance management
<p>Interface to licensing system</p>
<ul style="list-style-type: none"> • Other Observations:
<p>Is Adobe packaged within solution? Integrated: will be included with EmpowerMe or other solutions can be used.</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
 RFP TITLE: Maine Comprehensive Child Welfare Information System
 BIDDER NAME: CGI Technologies and Solutions Inc.
 DATE: July 9, 2019
 EVALUATOR NAME: Gil Ouellette
 EVALUATOR DEPARTMENT:

Instructions: The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Presentation based on the OHIO Model through the lens of a Super User

<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
<p>Sandy Malony introduced their EmpowerMe solution Demo was given on an IPAD They were able to demonstrate the automated case worker activities SDM Tool is part of the package Strong use of drop downs that can be configured based on our flows</p>
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization
<p>Offline Activity currently in development could be an issue, but say it could be customized for Maine</p>
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
<p>No comments in this section</p>
<ul style="list-style-type: none"> • Demonstrate how the system supports Court activities: <ul style="list-style-type: none"> ○ Interface ○ Keep track of and notify case worker of upcoming hearing ○ Produce discovery ○ Support redaction of documents ○ Produce court notifications
<p>Security profile allows for read write to specific modules for discovery Redaction accomplished through use of ADOBE</p>
<ul style="list-style-type: none"> • Demonstrate how the electronic document management function integrates with the system: <ul style="list-style-type: none"> ○ Entry ○ Storage ○ Export ○ Recall

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

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BIDDER NAME: CGI Technologies and Solutions Inc.

DATE: July 9, 2019

EVALUATOR NAME: Gil Ouellette

EVALUATOR DEPARTMENT:

No comments in this area
<ul style="list-style-type: none">• Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
Additional link to Specific training licensing agency part of the package
<ul style="list-style-type: none">• Give an example of how supervisors can use data collected to make decisions.
<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:
Did not get through their entire presentation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 17, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
<ul style="list-style-type: none"> • Delaware FOCUS • Salesforce • COTS, SaaS platform. statewide operation for 16 months. • 10 active child welfare projects and a total of 22 state child welfare programs that we have served since 1993. • Many awards • Allegany County
2. Subcontractors
<ul style="list-style-type: none"> • may decide to use subcontractors to supplement our technical staff for the Maine CCWIS project
3. Organizational Chart
<ul style="list-style-type: none"> • Included
4. Litigation
<ul style="list-style-type: none"> • Did not provide
5. Financial Viability
Low Failure risk
6. Licensure/Certification
<ul style="list-style-type: none"> • Included
7. Certificate of Insurance
<ul style="list-style-type: none"> • Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 17, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
No site identified
B. CCWIS Functionalities and Priorities
<ul style="list-style-type: none"> • NextGen 4.0 for CCWIS solution. • user-centric design approach • real-time workforce management dashboards • SAFe Scaled Agile approach • Mobile interface
Will need additional federal approval as a SaaS solution
C. CCWIS Document Repository Expectations
Microsoft SharePoint
D. Management Approach
Not sure of the approach
E. CCWIS Hosting
Cloud based
F. CCWIS Technical Requirements
Adressed
<ul style="list-style-type: none"> • Salesforce document repository to manage all case documentation. The solution supports all types of documents across business functions, including statements, notices, forms, emails, images, background documents, as well as scanned and indexed documents (e.g., PDF, Word, Excel, PNG, JPEG, TIFF, TXT, BMP, PowerPoint, Genogram, Visio, OneNote). • Screens look clean and logical • Delaware, our solution interfaced with their payment system to process vouchers, payments, and checks. • I like the leading practice and from the field sections • Salesforce Einstein
G. Operations and Maintenance
Salesforce offers a "Platform-as-a-Service" (PaaS) architecture
Not sure I understand helpdesk plan
H. Software Ownership and Application Transfer
Only own data
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
18-month timeline for solution development with a one-month pilot.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Deloitte Consulting LLP

DATE: June 17, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

3. Technical Solution – Including Licensing and Integration Information
Not sure I understand their plan for the out years changes needed to the system past initial implementation.
At the end of contract we get data.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 20, 2019 (final save June 24, 2019)

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

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Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
Implementation in 20 states (Delaware – complete CCWIS system implemented in 18mos)
Have also worked w/ID, DC, PA, LA, MI & NH
Has implemented NCCD's SDM – I/P
2. Subcontractors – None specifically identified at this time
3. Organizational Chart - Provided
4. Litigation –?? Does not appear to be provided
5. Financial Viability - Dun & Bradstreet Comprehensive Insight Plus report, JPMorgan Chase Bank Letter of Reference, Letter of Bondability provided
6. Licensure/Certification – PMP, CSM, SAFe, ITIL, Salesforce, Oracle, MCD, CEH,
7. Certificate of Insurance - Certificate of Liability Insurance attached

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 20, 2019 (final save June 24, 2019)

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements - Seeking a location in Central Maine.
B. CCWIS Functionalities and Priorities
Pre-configured Next Gen 4.0 – Intake through financial
Mobile capability - I
Claim to deliver functional CCWIS solution in 18mos w/1mo pilot - P
Complies w/ACF CCWIS requirements (federal)
C. CCWIS Document Repository Expectations
Will utilize Sharepoint – can be implemented and configured on State’s Intranet, no per user cost
D. Management Approach
SAFe, Scaled Agile approach to support configuration of SaaS NextGen 4.0 solution
E. CCWIS Hosting – Cloud-based platform
F. CCWIS Technical Requirements – Collaborate, support, leverage
Provides staff management, security management, doc generation, doc management, mobility (can complete tasks on tablet/smartphone),
45 CFR compliant
G. Operations and Maintenance -
On-premise solution
Backup, recovery and disaster plans
Help desk support ongoing
H. Software Ownership and Application Transfer
Deloitte will maintain ownership of the software, users will access software via a portal
On-premise, non-SaaS solution
I. Staffing Requirements
Job descriptions provided
Staff resumes provided
2. Initial Performance Period Summary Level Plan
18 mo plan (10wk initiation, 15 sprints of 3wks, 10wk UAT, pilot months 19-48)
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 20, 2019 (final save June 24, 2019)

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

NextGen Salesforce Pre-configured for CCWIS

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 18, 19, 20, 2019

EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization – P integrates with other partners external and internal, CBHS, Courts. P – history and current work with multiple states on various CW projects. VR training. Performance management. 10 active child welfare agencies working with.
2. Subcontractors - none yet but may have some need for subcontractors later on.
3. Organizational Chart - would see the advisors as key for implementation
4. Litigation - M – did not answer the question/provide details.
5. Financial Viability – report given
6. Licensure/Certification -
7. Certificate of Insurance - met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 18, 19, 20, 2019

EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements – none in State, will have to locate an office. Monday through Friday 8-7
B. CCWIS Functionalities and Priorities - cloud based platform, System partners with multiple entities. Provides data. Mobile. P – homepage, reports of live data, accessibility of information for all staff. Einstein’s next best action
C. CCWIS Document Repository Expectations - SharePoint retrievable, P.
D. Management Approach – Agile management, well described in the proposal
E. CCWIS Hosting – no hosting as all cloud based. Backs up in districts/almost real time – Q real time
F. CCWIS Technical Requirements – able to house multiple media i.e. photos, genograms, scanned documents. Tracks use of staff. Various permission levels. Called NextGen 4.0. web based security. Multiple modules for various program areas. SDM use. Web based, modular solution. States meets CCWIS federal requirements. Able to integrate with other systems. I their intake module. Stated improved a state report intake by 54%. Online reporting. I/P assessment module linking to other systems, supervisor reviews. Unclear of the difference between modules. Mention on how to build collaboration between agencies internal and external. Ease of viewability. Electronic ability to store and do reporting out.
G. Operations and Maintenance – P will use Salesforce. plan laid out for OIT inclusion and staff participation. 24/7 365 support , states recovery up to 90 days, have another solution will share if work with Maine. Data storage.
H. Software Ownership and Application Transfer - state will own, stored on site DHHS.
I. Staffing Requirements - have staff who have implemented CCWIS system, know CW experience.
2. Initial Performance Period Summary Level Plan – 18 month delivery with 1 month pilot.
3. Technical Solution – Including Licensing and Integration Information – separate licensing fees included in the cost, not sure of ongoing cost. No user manual, states online and features help function. Held on the Salesforce gov cloud. Expect OIT staff to learn Salesforce.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Support Information System
BIDDER NAME: Deloitte Consulting LLP
DATE: June 20, 2019
EVALUATOR: Jenna Joeckel
DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
First to fully integrate SDM model into child welfare system, 22 states, 2 Canadian provinces, e file cabinet, youth portal to access records when exiting care. Virtual reality and home visitation training. Document sensing features, check in and check out, speech to text app on mobile device. Online/offline capability
2. Subcontractors
Possible technical staff
3. Organizational Chart
included
4. Litigation
No details provided.
5. Financial Viability
Satisfactory from JP Morgan, risk 3
6. Licensure/Certification
7. Certificate of Insurance
Liability Certificate- insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: June 20, 2019

EVALUATOR: Jenna Joeckel

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Outlook integration, 18 month implementation, go live month 20
Central Maine office 8-5 hours
B. CCWIS Functionalities and Priorities
NextGen 4.0, task alert-overwhelming?
C. CCWIS Document Repository Expectations
Microsoft Share Point, hosted by Maine
D. Management Approach
Agile coach
E. CCWIS Hosting
On premise hosting not applicable, FedRAMP
F. CCWIS Technical Requirements
SaaS Platform, Salesforce
G. Operations and Maintenance
Document generation. Enables workers to document case notes with the native keyboard, Bluetooth keyboard, voice-to-text, or with a stylus OOB reporting capability, dashboards
Mandated reporter tracking, uploading attachments, supervisor checklist, signature management-electronic signatures? Genogram, can store photos and videos, links emails?
Not an on premise platform, 1 time per month planned outages? Data Recovery?
H. Software Ownership and Application Transfer
I. Staffing Requirements
SME?
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information
No data left behind goal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Support Information System
BIDDER NAME: Deloitte Consulting LLP
DATE: 6/21/2019
EVALUATOR: Daniel Lynch
DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization (DE, DC, MI, CO, NH...)
p-multiple states success
i-only full cloud-based CW solution
p-experience with Agile deliveries
p-experience in DE with legacy transfer
p-experience in DC with on-premises hosting
i-fourth reference (CO) not considered, additional to RFP
i-fifth reference (ID) not considered, additional to RFP
2. Subcontractors
i-Uncertain at this time.
3. Organizational Chart
p-Scum Coach included—shows foresight
i-no corporate or executive tie to org chart
p-tech team already id'd.
p-training team lead id'd
4. Litigation
m-disclaimer, but did not answer RFP
5. Financial Viability
p-D&B report current year (1/9/19)
p-1R3 D&B Rating
p-Credit recommendation \$400K-\$900K
p-JP Morgan Bank Ref
p-Surety bond \$50M single; \$200M aggregate
6. Licensure/Certification
p-list of certifications that are associated with team
i-no company certifications listed (ISO, etc)
7. Certificate of Insurance
p-\$1M General, Professional, Workman's Comp; \$5M Cyber, Network

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: 6/21/2019

EVALUATOR: Daniel Lynch

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
p-will operate admin office in central Maine
p-already researched possibilities; included in cost
B. CCWIS Functionalities and Priorities
i-configurable SaaS no code-low code cloud-based
p-Agile implementation
i-SalesForce platform
p-18 mos timeline for development, 1 mo pilot
p-bi-directional with Maine accounting system, Fire Marshall, MaineCare
i-NextGen 4.0 driven—appears flexible, configurable, Human Centric Design Approach
p-one-time data entry, accessible from/by others
i-use of Agile/Sprint-manage iterative/incremental deliverables
C. CCWIS Document Repository Expectations
p-SharePoint Doc repository
p-SharePoint populated with documents/references from previous clients
p-SharePoint repository hosted on State Intranet (allows accessibility, security, disaster)
D. Management Approach
p-using a proven management approach SAFe (Agile, lean, government-focused)
p-management plans submitted w/in 30 days
i-lots of redundancy in submission
E. CCWIS Hosting
i-on premise is N/A. Salesforce cloud-based
p-non specific platform, accessible from any internet connection, no software loaded
p-supports scalable security and access
F. CCWIS Technical Requirements
p-leverage previous states
p-compliance with ACF
p-interfaces with MACWIS and new points
p-mobile (Caseworkers)
p-FM incorporates one-of payments, invoice generation, external submissions, etc. Robust
p-comprehensive legacy transfer plan, based on experience
p-Training plan included
G. Operations and Maintenance
p-includes maintenance tasks, knowledge transfer, technology maintenance (upgrades)
p-data stored w/in US, unable to be viewed from outside/isolated from other states/viewers

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Deloitte Consulting LLP

DATE: 6/21/2019

EVALUATOR: Daniel Lynch

DEPARTMENT: Health and Human Services

q-Help Desk plan—does it meet RFP? Table II-48 yes, Fig II-57?, narrative??
p-security for Salesforce based on FedRAMP compliance
H. Software Ownership and Application Transfer
i-data transfer back to state at conclusion
q-non-royalty license provided to state..but, “per the IP Ownershipo terms of the final contract as agreed...” So, does the cost include this, or not?
I. Staffing Requirements
i-robust list of state provided staff to collaborate project
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services **Notes taken on 6/22-23/2019 Section II**

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Individual Evaluator Comments: Notes Taken on 2/21-22/2019 Section I

Part IV.B. Section I
1. Overview of the Organization
Deloitte has more than 12k employees in the public sector in the U.S. They have conducted Child Welfare System work in Delaware, Idaho, D.C., Pennsylvania, Louisiana, Michigan, and New Hampshire. All in all, they have partnered with 22 states and 2 Canadian Provinces over the years. They are currently active in 9 states and 1 Province in the form of mobile deploys, and COTS based SAAS implementations including Salesforce. They have 25 years CWE experience utilizing SAAS innovation, web reporting, VR training, Mobile Apps, Dashboards, document management, real time interfaces, assessment tools, interfaces with schools, and background checks. Their skills include project management, and integration expertise. They have hands on experience with their proposed technical architecture. The Maine proposal is based on the Salesforce COTS, SaaS platform (they have 15 years exp. with Salesforce). They support OMS with the COTS based MMIS implementation and have worked with other Maine State Agencies. They provide health and pension actuarial services through DAFS. They have experience in all Service/Software delivery life cycles areas with many states. They have agile methodology experience. They claim to be the only firm to have implemented a fully operational, statewide CPS system in the last five years. Their project examples include: Project 1 The State Reference - Delaware Focus implemented in 2016 includes the service modules we are looking for They claim it is the only cloud based deployed CRM solution in full, state wide production. That sits on a dedicated government cloud aligned with FedRamp. They provide both an overview and describe CPS capabilities of the system which include operational efficiencies increasing ease of use and visibility of information across service providers making it easier to locate information and decreasing time spent on the system and added ability to telework through the cloud. In addition, reacting to policy and regulation changes are much easier. Project 2. Business Reference is D.C.'s., FACES.net, which was implemented in 2006. Application support continues through modifications and enhancements. The application is used by 1,200 case workers, supervisors and administrators and includes the modules we are looking for in our RFP. Project 3. Michigan's CPS Mobile Investigator and Supervisor Portal Deployment App is built on a Salesforce platform and supports three solutions. Mandated Reporter and Supervisory Control portals and a new Mobile Application. It also contains the service modules we are looking to implement. They list two other recent implementations; one in Colorado [Colorado Child Care Assistance Program Eligibility System (CHATS)] and the other in Idaho [Ensuring Safety and Permanency (ESPI)]. All listed project contained the contact person, phone number and e-mail address.
2. Subcontractors
Although not specifically identified at this time, Deloitte may decide to use subcontractors to supplement technical staff for the Maine CCWIS project.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services **Notes taken on 6/22-23/2019 Section II**

3. Organizational Chart
They provide a high-level chart showing CEO and sector specific organizational breakdown in section 1, Overview of Organization section of their proposal. Under section 3. The project hierarchy starts with the PM. There is no indication of who the PM reports to. The project leads are identified by name and title. Sub team size not identified. No evidence of Organizational Development/Change Management Lead/resource.
4. Litigation
No list provided. They State in the last paragraph of their attachment 4; " We do not believe that such matters will affect our ability to provide consulting services, or that they will affect our ability to serve the State of Maine in connection with this proposed engagement"
5. Financial Viability
Certain Aspects of the D&B Comprehensive Insight Plus Report provided. As this is not one of my strength areas, I reserve comments at this time. The Bank Reference was provided from J.P. Morgan Chase Bank. They Provide a letter from Travelers Casualty and Surety Company of America dated May 17, 2019 stating that at the present time Deloitte Consulting LLP is in a position to consider single projects up to \$50M within an aggregated limit of \$200M and that upon request, Travelers casualty and Surety Company of America Will give favorable consideration to providing the required performance and payment bonds. Consideration is subject to their standard underwriting at the time of the final bond request.
6. Licensure/Certification
PMP, SCM, SAFe, SCP, ITIL, Salesforce Certifications. Certification (Doesn't list whether all PMs will have this certification, nor does it show on the Organizational chart). SCM, SAFe, and SPC (Same concern as with PMP).
7. Certificate of Insurance
ACORD Certificate received. General, Automobile, Workers Comp and Employment liability included. Cyber, Network and Privacy liability included with Professional liability.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services **Notes taken on 6/22-23/2019 Section II**

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Deloitte will operate and administrative office within central Maine, ensuring availability of services Monday through Friday 8am to 5pm est. They will follow our holiday and administrative closing schedules. Key personnel would be available during normal business hours (We will need to define who the Key business personnel are)
B. CCWIS Functionalities and Priorities
Deloitte's solution leverages their Salesforce CRM platform knowledge and Government cloud services. This in conjunction with their pre-configured NextGen 4.0 solution should provide SOM with best practices child welfare system. They provide a visual diagram depicting the proposed functionality/provided services showing relationships to both end user and back end environments that encompass intake, resource management, investigations, financial management, case management, and Title IV-E eligibility determination.
C. CCWIS Document Repository Expectations
Deloitte recommends using Microsoft SharePoint as the Project Management document repository, which will be pre-loaded with assets which including: Key project artifacts and reference documents from prior implementations of their previous CCWIS modules.
D. Management Approach
Deloitte proposes, and Agile delivery based on SAFe Scaled Agile Tailored for government which fosters lean thinking. This requires constant collaborative effort between cross-functional resources at each level of the project. Their reasoning is that this approach supports the rapid configuration of the SaaS NectGen 4.0 solution.
E. CCWIS Hosting
Deloitte's solution is built on a Salesforce cloud-based platform and is browser agnostic, supporting the major browsers (Firefox, Chrome, Safari, IE, Edge). The Salesforce cloud-based platform is a FedRAMP (Federal Risk and Authorization Management Program) certified.
F. CCWIS Technical Requirements
Deloitte's NextGen 4.0 is comprised of a series of modules, services, and pre-built accelerators. It maximizes real time information sharing through bi directional interfaces. They indicate that the solution meets all CCWIS regulations. They explain each of the modules that were implemented in detail to give an idea of how we can expect the modules to work within our solution.
G. Operations and Maintenance
This solution would be hosted on Salesforce, a SaaS CRM platform and although it is not an on-premise platform, it provides integration capabilities with our assets and systems. Our solution would be built on Salesforce for government platform, a separate partitioned instance of Salesforce's multi-tenant public cloud infrastructure.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DEPARTMENT: Health and Human Services **Notes taken on 6/22-23/2019 Section II**

H. Software Ownership and Application Transfer	<p>On-Prem - Deloitte's Maine CCWIS will be hosted as a SaaS solution on Salesforce and our SharePoint repository will be hosted On-premis.</p> <p>Non-SaaS Solution –The NextGen 4.0 is preexisting Deloitte intellectual property. They will agree to provide a royalty-free, nonexclusive, and irrevocable license to use the software per the IP ownership terms of the final contract as agreed between the parties this would be . In compliance with applicable federal ownership provision language in 45 CFR 95.617. They agree that any item indicated in B. which are deliverables of work products developed under the awarded contract would be provided to the State. They will work with us to finalize end of contract terms that are agreeable to all parties.</p>
I. Staffing Requirements	<p>They list and include resume information for three key Resource: Richard Marsden (PM), Beryl Washington (Business SME), and Nathan Holler (BA). In addition they provide a list and brief bio for each of their Project Leads who, in addition to Richard, Beryl, and Nathan includes: Prabhakar Arulraj (Technical Architect and SCRUM Master), Fiasal Mohammad (Salesforce SaaS Architect), Srinivasan Venkatesan (Data Conversion Lead), Bala Konakalla (Interface Lead), Hersh Parikh (Security Lead), Coral Cordova (Training Lead), Jamia McDonald (Child Welfare Specialist/Advisor), Sanjay Shah (CRM Lead), Sameer Bhat (Salesforce CRM Advisor), Suguna Sundhar (CCWIS Industry Lead), Scott Workman (Lead Engagement Reviewer), Roni Goldman (Agile/Scrum Coach)</p>
2. Initial Performance Period Summary Level Plan	<p>Deloitte proposes and 18-month deployment timeline with a one-month pilot. They propose, an Agile delivery based on SAFe Scaled Agile methodology. The project would be initiated with a 10-week planning, discovery, and installation phase. Solution configuration would occur in 15 three weeks sprints. This would be followed by a hardening sprint followed by a 10-week UAT window, during which training is finalized and delivered. This would be followed by the pilot then full deployment</p>
3. Technical Solution – Including Licensing and Integration Information	<p>The indication is that the solution satisfies federal CCWIS requirements. State requirements will be tailored and localized during the configuration sprints. They provide a licensing bill of materials. They have a model for data migration of our legacy data into the salesforce repository. They don't offer a manual, instead they provide context sensitive help. The proposed solution is hosted on Salesforce Government Cloud. It is a Software as a Service model. The Government Cloud hosts and stores data within the United States, and the cost is covered in the licensing costs.</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: 6/18/19 & 6/24/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
Child welfare in 20 states, 5 since CCWIS, HHS experience, integration experience, SAAS platforms Experience with Salesforce – leading SF integrator, Gartner leader + Agile experience, ME DHHS experience and project management. Cite lead role for implementation of MMIS DE complete CPS implementation 10 active projects, can leverage functionality implemented in other states, includes process review and requirements 12k employees Listed awards/rankings Project 1 – DE – full statewide production, cloud based, salesforce, similar to ME project Project 2 – DC – enhancements, on-prem Provided 5 references, all with relevant components. Includes ID in progress for intake. P Broad state and HHS experience including ME, Recognized SF implementation and integration, depth of experience with CCWIS regulations and implementations, multiple child welfare systems using solution including DE, ID.
2. Subcontractors
Not planning to use any at this time
3. Organizational Chart
Provided. Headed by PM, no exec level
4. Litigation
Not provided. some rare litigation will not affect ability to provide services
5. Financial Viability
D&B – low risk, financials not available Bond in attachment 14 - provided
6. Licensure/Certification
Team has PMP, CSM, SPC, ITIL, other IT certs P- Salesforce certs

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: 6/18/19 & 6/24/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

7. Certificate of Insurance
Provided. \$5m cyber, network and privacy liability 6/1/19-20

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: 6/18/19 & 6/24/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Will use real estate team to identify location in central Maine and has quotes
B. CCWIS Functionalities and Priorities
Salesforce pre-configured Nextgen 4.0 - best practices, Human Centered Design and lessons learned 18 months and 1-month pilot P operational dashboards embedded in application Data quality – enforce business rules Operational and analytics reports SAAS / COTS with Agile approach for design and configure stage and Agile coach P – delivery accelerators including baseline use cases P- minimum viable product for 90-10 rule P- device agnostic
C. CCWIS Document Repository Expectations
P Sharepoint – with preloaded assets, hosted at State
D. Management Approach
SAFe Scaled Agile Plans follow Project Management methodology
E. CCWIS Hosting
P Salesforce is cloud based, fedramp certified – moderate level
F. CCWIS Technical Requirements
Mapped to CCWIS and child welfare policy manual P - SF document management module supports varied document types Oracle ESBs and API for interfaces SF Identity access management not integrated with State Complies with OIT policies P- business rules use tools that can be configured quickly P- interface experience in several states – high rate of re-use P- comprehensive plan details P data conversion – uses lessons learned, tools, mock conversions, iterative approach, parallel process P- reporting – uses lesson learned and gap analysis
G. Operations and Maintenance
SF automatic updates planned release schedule M On-prem DR to supplement backup to support RPO and RTI. Customer responsibilities SLA will be in agreement between SF and Dept

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EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

M Note June 2019 SF widespread outage ? SOC 2 provided is for AWS – SF hosted by AWS, need NDA for access to reports Use State telephony and ticketing for help desk
H. Software Ownership and Application Transfer
P -Will provide license to use nextgen4 and will own configured CCWIS
I. Staffing Requirements
Actual staffing levels not provided p- roles definitions P- PM has reference project experience P- SME was product owner, also in DE, has project management experience in addition P- BA several State implementations including DE, scrum and agile advisor P-strong team, relevant experience, numerous certifications
2. Initial Performance Period Summary Level Plan
15 sprints, P task description laid out with details to explain approach mapped to staffing and artifacts P- sprint detailed view
3. Technical Solution – Including Licensing and Integration Information
Meets requirements Purchase SF through Carahsoft. Vendor accountability model not clear Will provide knowledge transfer for SF including training and certification paths P- declarative configurations – no code capability P SF APIs can be accessed by Oracle ESB and common interfaces already developed Tableau reporting can be connected

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Lynne

EVALUATOR DEPARTMENT: DHS SC

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- Demonstrate any automated case worker activities:
 - Communications
 - Reminders
 - Calendar Appointment
 - Dashboards

SALESFORCE - NEXTGEN 7.0
 LAYOUT SAME FOR MOBILE/Desktop
 Device Agnostic

Home page - dashboards - tasks/case loads
 - Calendar - schedule - Integrated w/ M Outlook
 Comms - use chatter
 Task list - Bell notification
 Global search

- Demonstrate field activities being complete on the mobile platform of the solution:
 - Collect signatures - Document capture
 - Receive documents
 - Complete or review a plan/assessment/release of information Assessment
 - Offline activity - End of demo ✓
 - Service authorization ✓

Following Capability
 does have to be reviewed - sequential numbered

- Demonstrate decision making tools in your system.
 SDM Outcome based.

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Dan Lynch

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none">o Interface w/ Courto Keep track of and notify case worker of upcoming hearingo Produce discoveryo Support redaction of documentso Produce court notifications
<p>Maintain links w/ court structure Redact capability - via double click</p>
<ul style="list-style-type: none">• Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none">o Entry <i>via Court process</i>o Storageo Exporto Recall
<ul style="list-style-type: none">• Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
<ul style="list-style-type: none">• Document MIB• provider agreements• license lists
<ul style="list-style-type: none">• Give an example of how supervisors can use data collected to make decisions.
<p>GRAM SUMMARY DETAILS ✓ LISTS for SOPA</p>

**STATE OF MAINE
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RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: *Dan Lynch*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.<ul style="list-style-type: none">- <i>CREATE Invoice</i>- <i>payment records</i>
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management<ul style="list-style-type: none">- <i>GOALS</i>- <i>Continuing Education</i>- <i>Degrees</i>
<ul style="list-style-type: none">• Other Observations:<ul style="list-style-type: none">- <i>NUMSERIES ?</i>- <i>RPO/RTO - Salesforce.com. met exceeds RFP</i>- <i>Fields can Auto populate</i>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Jenna Joeckel

EVALUATOR DEPARTMENT:

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<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards 	<p>organized based on preference - widgets. integrated w/ outlook → tasks - Chatter feature. Global search functionality</p>
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization 	<p>looks the same on desktop + mobile solution Can follow cases to get updates photograph to upload document scrolling for tiles Identification numbers for files?</p> <p style="text-align: right;">*can work offline + resync when online again.</p>
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system. 	<p>SDM tool - Questionnaire - NCCD? can be configured.</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: *Tenna Doekal*

EVALUATOR DEPARTMENT:

- Demonstrate how the system supports Court activities:
 - Interface
 - Keep track of and notify case worker of upcoming hearing
 - Produce discovery
 - Support redaction of documents
 - Produce court notifications

*Case Print
Redaction.*

- Demonstrate how the electronic document management function integrates with the system:
 - Entry
 - Storage
 - Export
 - Recall

Attachments with case

- Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.

List who is in the home.

- Give an example of how supervisors can use data collected to make decisions.

*Genogram
Timeline*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Jenna Joekel

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">o Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
Tracks Education CE + Conferences
<ul style="list-style-type: none">• Other Observations:
Maine Performance Dashboard can specify by county.

Bob Blanchard

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Bob Blanchard

EVALUATOR DEPARTMENT:

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<ul style="list-style-type: none">• Demonstrate any automated case worker activities:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Communications<input checked="" type="checkbox"/> Reminders<input checked="" type="checkbox"/> Calendar Appointment<input checked="" type="checkbox"/> Dashboards
<ul style="list-style-type: none">- Files for configurations- interface with Outlook- global search
<ul style="list-style-type: none">• Demonstrate field activities being complete on the mobile platform of the solution:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Collect signatures<input checked="" type="checkbox"/> Receive documents<input checked="" type="checkbox"/> Complete or review a plan/assessment/release of information<input type="checkbox"/> Offline activity<input checked="" type="checkbox"/> Service authorization
<ul style="list-style-type: none">Signatures on the application directly
<ul style="list-style-type: none">• Demonstrate decision making tools in your system.
<ul style="list-style-type: none">SDM

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

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BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Bob Blanchard

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Interface<input checked="" type="checkbox"/> Keep track of and notify case worker of upcoming hearing<input checked="" type="checkbox"/> Produce discovery<input checked="" type="checkbox"/> Support redaction of documents<input checked="" type="checkbox"/> Produce court notifications
<ul style="list-style-type: none">• Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Entry<input checked="" type="checkbox"/> Storage<input checked="" type="checkbox"/> Export<input checked="" type="checkbox"/> Recall
<ul style="list-style-type: none">• <input checked="" type="checkbox"/> Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
<ul style="list-style-type: none">• <input checked="" type="checkbox"/> Give an example of how supervisors can use data collected to make decisions.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: *Bob Blanchard*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• <input checked="" type="checkbox"/> Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">• <input checked="" type="checkbox"/> Demonstrate operability with financial management system.
<ul style="list-style-type: none">• <input checked="" type="checkbox"/> Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:

Sam Georgina

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Sam Georgina

EVALUATOR DEPARTMENT:

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- Demonstrate any automated case worker activities:
 - Communications
 - Reminders
 - Calendar Appointment
 - Dashboards

Dashboard - View - worker friendly - is outlook used yes
like the previous
chatting feature - push into to workforce / FB feed
tasks / 52
9/10/2017 search - have in messages

- Demonstrate field activities being complete on the mobile platform of the solution:
 - Collect signatures
 - Receive documents
 - Complete or review a plan/assessment/release of information.
 - Offline activity
 - Service authorization

navigated through back button
scanned not named - need to recheck attached.
no idea what the file is all #15,
the files are too complicated - need to put in name
does not appear

- Demonstrate decision making tools in your system.

Mandated Reporter on line send photos

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Gina Gogins

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none">○ Interface○ Keep track of and notify case worker of upcoming hearing○ Produce discovery○ Support redaction of documents○ Produce court notifications
<p>have done at other courts regarding is manual photos embedded.</p>
<ul style="list-style-type: none">• Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none">○ Entry○ Storage○ Export○ Recall
<p>Documents all #s can be certified</p>
<ul style="list-style-type: none">• Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
<p>Watched through introduction - Did not see training process for RP.</p>
<ul style="list-style-type: none">• Give an example of how supervisors can use data collected to make decisions.
<p>Program in features checklist of features Supervisor overview</p>

STATE OF MAINE
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BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: *Gina Gogins*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">◦ Example – Tracking placements of children
<i>Can develop data reports</i>
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<i>Info from the case Can see spread sheets - Title IV-B</i>
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<i>Salesforce - many demographics Dash board → Show in worker screen</i>
<ul style="list-style-type: none">• Other Observations:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER NAME: Deloitte Consulting LLP
DATE: July 9, 2019
EVALUATOR NAME: Jenny Dillihunt Brown
EVALUATOR DEPARTMENT: OCFS

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

<ul style="list-style-type: none">• Demonstrate any automated case worker activities:<ul style="list-style-type: none">○ Communications<ul style="list-style-type: none">○ Home page is primary communication hub○ Chatter feed○ Reminders<ul style="list-style-type: none">○ Notification bell upper right corner of home page alerts to new info○ Configurable reminders (can be color coded, alerts can be configured)○ Calendar Appointment<ul style="list-style-type: none">○ Today's Schedule○ Integrated with Microsoft Outlook○ Dashboards<ul style="list-style-type: none">○ Configurable
<ul style="list-style-type: none">• Demonstrate field activities being complete on the mobile platform of the solution: (note: same on mobile as on laptop)<ul style="list-style-type: none">○ Collect signatures<ul style="list-style-type: none">○ Simple Signature (electronic)○ Receive documents○ Complete or review a plan/assessment/release of information<ul style="list-style-type: none">○ Documents to be completed do not appear to auto populate with case information○ Offline activity<ul style="list-style-type: none">○ Ability to complete work offline, changes are saved and system notes an upload is pending. Upload can be initiated upon reconnection w/wifi and updates are automatically saved.○ Service authorization<ul style="list-style-type: none">○ Providers appear to be identified by number rather than name
<ul style="list-style-type: none">• Demonstrate decision making tools in your system.<ul style="list-style-type: none">• Structured Decision Making (SDM) is embedded
<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none">○ Interface

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EVALUATOR NAME: Jenny Dillihunt Brown

EVALUATOR DEPARTMENT: OCFS

<ul style="list-style-type: none"> ○ Has integrated with other States' court systems? ○ Keep track of and notify case worker of upcoming hearing ○ Produce discovery <ul style="list-style-type: none"> ○ "Case Print" gathers information from identified areas in the case ○ Attachments (including photos & documents) can be provided thru discovery process ○ Support redaction of documents <ul style="list-style-type: none"> ○ Redaction is supported by double clicking on an item in the "Case Print" ○ Produce court notifications
<ul style="list-style-type: none"> ● Demonstrate how the electronic document management function integrates with the system: <ul style="list-style-type: none"> ○ Entry <ul style="list-style-type: none"> ○ Photo upload using tablet features or via scanner connected to desktop ○ Storage <ul style="list-style-type: none"> ○ Naming of files unclear re: documents ○ Export ○ Recall <ul style="list-style-type: none"> ○ Unclear naming of files complicates caseworker's recall of specific documents
<ul style="list-style-type: none"> ● Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents. <ul style="list-style-type: none"> ● Can document licensing process & training
<ul style="list-style-type: none"> ● Give an example of how supervisors can use data collected to make decisions. <ul style="list-style-type: none"> ● Caseworker workloads visible
<ul style="list-style-type: none"> ● Demonstrate analytic tool specifically the ability to develop ad hoc data. <ul style="list-style-type: none"> ○ Example – Tracking placements of children <ul style="list-style-type: none"> ○ Caseworker workload report demonstrated
<ul style="list-style-type: none"> ● Demonstrate operability with financial management system.
<ul style="list-style-type: none"> ● Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none"> ● Other Observations: <ul style="list-style-type: none"> ● Maine Performance Dashboard shows statistics for all counties and units in ME.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Hazel Stevenson

EVALUATOR DEPARTMENT: Admin and Finance

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<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
Configurable tabs for workflow Flexible dashboard Integrated with outlook Chatter feed for communications Hyperlink from global search
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization
Look and feel same for all devices Signature demonstrated Offline/ re-sync when re-connect demonstrated
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
<ul style="list-style-type: none"> • Demonstrate how the system supports Court activities: <ul style="list-style-type: none"> ○ Interface ○ Keep track of and notify case worker of upcoming hearing ○ Produce discovery ○ Support redaction of documents ○ Produce court notifications
<ul style="list-style-type: none"> • Demonstrate how the electronic document management function integrates with the system: <ul style="list-style-type: none"> ○ Entry

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EVALUATOR NAME: Hazel Stevenson

EVALUATOR DEPARTMENT: Admin and Finance

<ul style="list-style-type: none"> ○ Storage ○ Export ○ Recall
Redaction of documentation built in
<ul style="list-style-type: none"> • Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
Can integrate if have provider management system
<ul style="list-style-type: none"> • Give an example of how supervisors can use data collected to make decisions.
Genomap and relationship tree Workload dashboard
<ul style="list-style-type: none"> • Demonstrate analytic tool specifically the ability to develop ad hoc data. <ul style="list-style-type: none"> ○ Example – Tracking placements of children
<ul style="list-style-type: none"> • Demonstrate operability with financial management system.
<ul style="list-style-type: none"> • Staff professional development tracking training, conferences, performance management
Hierarchy of roles
<ul style="list-style-type: none"> • Other Observations:
RPO/RTO – yes – RFP has RPO & RTO24. SF has dedicated team for catastrophic failure and commit to 12-hour RTO and 4-hour RPO. Added option – SF has data recovery for 90 days; typical discussion point at contract because some States require longer.

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RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: Deloitte Consulting LLP

DATE: July 9, 2019

EVALUATOR NAME: Gil Ouellette

EVALUATOR DEPARTMENT:

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<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
<p>Introduction by Richard Marsden of their Next Gen 4 solution based on the Delaware Implementation Key players introduces themselves Strong use of Tiles that can be sized and configured based on our flows Chatter Feature was interesting</p>
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization
<p>Fields can be set as Mandatory to ensure form completion Files were not named, just a series of numbers. This was clarified at the end of the presentation as done on purpose to easily identify pictures and reports during the presentation</p>
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
<p>Integrates with SDM and other similar tools</p>
<ul style="list-style-type: none"> • Demonstrate how the system supports Court activities: <ul style="list-style-type: none"> ○ Interface ○ Keep track of and notify case worker of upcoming hearing ○ Produce discovery ○ Support redaction of documents ○ Produce court notifications
<p>Full case record can be created that provides a holistic view of the case and links to attachments Redact is as easy as double clicking on the required fields</p>
<ul style="list-style-type: none"> • Demonstrate how the electronic document management function integrates with the system: <ul style="list-style-type: none"> ○ Entry

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EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">○ Storage○ Export○ Recall
No comments to this section
<ul style="list-style-type: none">● Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
<ul style="list-style-type: none">● Give an example of how supervisors can use data collected to make decisions.
Their Genogram concept is very interesting and would prove useful to a caseworker
<ul style="list-style-type: none">● Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">● Demonstrate operability with financial management system.
Financial module appears to be extremely robust.
<ul style="list-style-type: none">● Staff professional development tracking training, conferences, performance management
Their solution includes a very robust Performance Dashboard.
<ul style="list-style-type: none">● Other Observations:
They were able to clarify the RPO RTO questions raised during our initial RFP review

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: International Business Machines Corporation (IBM)

DATE: June 19, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

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Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
<ul style="list-style-type: none"> • Solution as a Service. • North Carolina -Received conditional approval under CCWIS guidelines from the Children's Bureau's Division of State Systems • Watson Health Solution • Only licensed solution that integrates Children’s Resource Center (CRC) Structured Decision Making® (SDM®) assessments • Two key staff members were state child welfare practitioners and one was also a federal representative of ACF. • leader in analytics and enterprise data warehousing in health and human services. Twenty states rely on IBM to meet their decision support and enterprise data warehouse needs for human services.
2. Subcontractors
Diona NCCD
3. Organizational Chart
Included
4. Litigation
N/A to RFP
5. Financial Viability
Limited detail
6. Licensure/Certification
included
7. Certificate of Insurance
Included

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BIDDER NAME: International Business Machines Corporation (IBM)

DATE: June 19, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Not yet identified
B. CCWIS Functionalities and Priorities
<ul style="list-style-type: none"> • commercial off the shelf (COTS) and SaaS. • North Carolina -Received conditional approval under CCWIS guidelines from the Children's Bureau's Division of State Systems • custom extensions developed for specific state- or tribal-identified processes and functions would be available for reuse by other licensed IBM customers. • 18 month Implementation • North Carolina's requirements, and the rapid implementation was achieved by the pilot rollout of our end-to-end solution within 22 months. • Endorsed by Children's research center • SDM integration • The Administration Application empowers nontechnical administrators to implement system and organizational changes through an easy-to-use web application. • Informational opening workspace • comprehensive rules-management •
C. CCWIS Document Repository Expectations
Box™ site, a cloud content management and file sharing service
D. Management Approach
Agile management strategy
E. CCWIS Hosting
IBM Cloud as a service
F. CCWIS Technical Requirements
Diona Mobile Investigations and Diona Mobile Visits,
<ul style="list-style-type: none"> • Integrated screening • Clean Screens • Right info at the right place • Graphics • No NEICE • All federal reporting addressed • Cognos Analytics platform, •
G. Operations and Maintenance
Agreed to all requirements

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H. Software Ownership and Application Transfer
Data only
I. Staffing Requirements
met
2. Initial Performance Period Summary Level Plan
<ul style="list-style-type: none">• Included-20 Month to release• Did not discuss much about post release and ongoing services like Help desk not discussed.
3. Technical Solution – Including Licensing and Integration Information
Watson Health provides hosting through its Health Insurance Portability and Accountability Act-compliant IBM Cloud platform with high availability and disaster recovery for the configured services.

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BIDDER NAME: International Business Machines Corporation (IBM)

DATE: June 21, 2019 (final save June 25, 2019)

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

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Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
NC replacement
Data warehousing 20 states
Children's Resource Center (CRC) SDM
2. Subcontractors – 2 provided Diona & NCCD
3. Organizational Chart - Provided
4. Litigation – No list located?
5. Financial Viability - Dun & Bradstreet Comprehensive Insight Plus report partial?, JPMorgan Chase Bank Letter of Reference, Surety Bond letter provided
6. Licensure/Certification – PMP, SFC, SCRUM Fundamentals
7. Certificate of Insurance - Provided

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EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Will provide location in central ME open M-F 8am-5pm EST excluding holidays
B. CCWIS Functionalities and Priorities
Combines attributes of COTS and SaaS
Ready-made, modular solution specifically for child welfare (IBM Watson worked w/ACF to provide input on CCWIS requirements)
Social program management platform
C. CCWIS Document Repository Expectations
Box site (cloud content management & file sharing)
D. Management Approach
Agile management strategy and approach
Initial 10mo implementation, by the end of 18mos, will have implemented requirements of RFP
E. CCWIS Hosting
Hosting on IBM Cloud – Watson Health will maintain, operate, and monitor service for production & nonproduction envts.
F. CCWIS Technical Requirements
Provides staff management, security management, doc generation, doc management, interfaces and mobility (can complete tasks on tablet/smartphone)
G. Operations and Maintenance
Providing solution as a service to SOM on IBM Cloud w/complete support model
Limit # of planned outages, maintain availability of 99.5%, restore data completely, recovery time of 24hrs, able to handle data inquiry/lookup, 30 notice of change in architecture or network ops, etc.
H. Software Ownership and Application Transfer (appears to meet requirements)
I. Staffing Requirements – will comply w/SOM OIT policy. Job descriptions provided, key staff resumes included, Watson Health will manage all subcontractors (NCCD & Diona)
2. Initial Performance Period Summary Level Plan – Attachment 13

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3. Technical Solution – Including Licensing and Integration Information
Appears to have met minimum requirements

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BIDDER NAME: International Business Machines Corporation (IBM)

DATE: June 21, 22, 2019

EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

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Individual Evaluator Comments:

Part IV.B. Section I
<p>Overview of the Organization - Received conditional approval under CCWIS guidelines from the Children's Bureau's Division of State Systems. Replaced 19 social program legacy systems and retired 7 legacy child welfare systems Statewide technology platform to support 100 counties in providing child welfare and child protection services. Reduces administrative effort for staff and more time assisting families. Utilize Agile methodology for phased implementation Replaced 6 redundant legacy systems Centralized technology platform to assist the 48 Children's Aid Societies Two key staff members were state child welfare practitioners and one was also a federal representative of ACF. North Carolina Families Accessing Services Through Technology (NC FAST) child welfare project team. Converted hundreds of health and human services systems including Medicaid eligibility systems, integrated eligibility systems, child welfare systems, child care, county benefit systems, and various modules of MMIS systems. North Carolina Department of Health and Human Services (DHHS) Ministry of Children, Community and Social Services (MCCSS) Freie und Hansestadt Hamburg (FHH), Behörde für Arbeit, Soziales, Familie und Integration</p>
<p>1. Subcontractors - Diona Mobility, turns mobile phones and tablets into tools to achieve better outcomes by helping agencies serve people more effectively while improving how their employees work and collaborate. 2. NCCD – works with child welfare agencies</p>
<p>3. Organizational Chart - positions not named. Hard to tell authority of the lines.</p>
<p>4. Litigation: Did not provide direct information regarding litigation. Stated - IBM is not currently a party to any lawsuit that will affect its ability to perform the services outlined in this RFP.</p>
<p>5. Financial Viability: provided an overview.</p>
<p>6. Licensure/Certification – PMP, Scrum, LCSW</p>

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7. Certificate of Insurance – Q what is the risk

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EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements - will need to locate an office in central Maine, work 8-5 weekdays.
B. CCWIS Functionalities and Priorities – worked directly with ACF on the standards, many staff members direct experience with CW. Web based. Program Solutions to replace Legacy. Mobile devices. P exhibit 1 outlining each program area and solutions capabilities. Provides management dashboards. Data reports
C. CCWIS Document Repository Expectations – flexibility in enhancements to program data, cloud based, agile states within 18 months will have implementation. Claims endorsement via the CRC, utilizing SDM tools. Watson Health will provide the Department and OIT access to the repository and files. We will provide an electronic copy or be prepared to transfer all documentation to the State, as requested, in a format agreed on by the State before the contract ends.
D. Management Approach – I/M In the daily stand-up, the participants each describe what they have accomplished since the previous stand-up, what they intend to deliver before the next stand-up and any obstacles that may be impeding their progress. Management plans to be introduce to OIT within the first 30 days.
E. CCWIS Hosting - Hosted on the IBM Cloud as a service to the State. Watson Health will maintain, operate, and monitor the service for the production and nonproduction environments within the IBM Cloud. backup. Disaster recovery that meet or exceed the State standards. The IBM Cloud platform is highly secure, is Health Insurance Portability and Accountability Act (HIPAA) compliant, and follows standard controls including those provided by the National Institute of Standards and Technology (NIST). Watson Health will coordinate and maintain the Solution in the IBM Cloud for the State for routine windows
F. CCWIS Technical Requirements – covers intake, assessment, case, resources, contracts, billing and other functions necessary to run a robust CW system. Placement matching described in proposal. Screens easy to read, mobility allowed, SDM tools embedded. Monitoring plan progress can intersect with various internal and external agencies. incorporates functionality to address the communications and notices requirements of social, health, and human services agencies. lets OCFS generate, manage, and record various types of correspondence—such as letters, calendar entries, notices, and forms—used to communicate with clients, providers, employers, and other participants. Calendar entries will be integrated with the Microsoft 365 calendar. Integrate with Maine’s MS 365 via MS APIs for internal or external communications. The Solution’s email, pro forma, and MS Word functions are used to issue communications from within the application. The recorded function captures information about communications issued outside the system or received by the organization. Performs audits in own system. Complies with HIPPA.
G. Operations and Maintenance - IBM Cloud with a complete support model. With the exception of the State of Maine Oracle ESB, Watson Health will provide the Operations and Maintenance

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DEPARTMENT: Health and Human Services

Plan for the listed responsibilities for the solution. Limited planned outages. Meets other criteria - P
H. Software Ownership and Application Transfer At the end of the contract, Watson Health will meet the requirement to provide the State CCWIS data to the Department or its designated agent in a format specified by the Department, accompanied by a detailed, complete data dictionary – P outlined tasks that will be done, by when.
I. Staffing Requirements: will comply with security expectations. History of working with various security requirements. Resume's included. State staff expected to be available and able to work and participate in various meetings. Some CW experience
2. Initial Performance Period Summary Level Plan – plan for 48 months.
3. Technical Solution – Including Licensing and Integration Information - P

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: International Business Machines Corporation (IBM)

DATE: June 22, 2019

EVALUATOR: Jenna Joeckel

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
20 states, international use, 19 countries, agile, NC
2. Subcontractors
Diona – mobility software, NCCD – researchers dedicated to improving lives of children and family
3. Organizational Chart
Present, unnamed roles
4. Litigation
SEC, no current litigation that would impact ability to develop CCWIS, see annual report
5. Financial Viability
Satisfactory, RR2 low risk
6. Licensure/Certification
present
7. Certificate of Insurance
Cert Present, need to prove

**STATE OF MAINE
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RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: International Business Machines Corporation (IBM)

DATE: June 22, 2019

EVALUATOR: Jenna Joeckel

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Will have Central Maine office
B. CCWIS Functionalities and Priorities
Product team members began as caseworkers and supervisors, 18 months
Initial implementation within 10 months, box site
C. CCWIS Document Repository Expectations
Cloud content management and sharing
D. Management Approach
Daily stand up meetings,
E. CCWIS Hosting
Offline capability
F. CCWIS Technical Requirements
0 security breaches, 10 Terabytes for electronic documentation, word documents not editable after finalization, mobility in the field Dashboard is helpful, prioritizing tasks, Mobility, warnings that have to be completed before final submission , history automatically surfaced to caseworker, do relationships need to be entered or are they generated? Contacts due panel, submitting placement requests directly, resource management, tracks trainings for providers,
G. Operations and Maintenance
, monthly patching for security
H. Software Ownership and Application Transfer
Not a lot of detail about how it will be implemented but minimal is met.
I. Staffing Requirements
Job descriptions and resumes present. Program manager qualified. Will need multiple OCFS staff.
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Support Information System
BIDDER NAME: International Business Machines Corporation (IBM)
DATE: 6/21/2019
EVALUATOR: Daniel Lynch
DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
p-proven company
p-NC as reference; Ontario and Hamburg as other two
i-fourth ref, not considered. In excess of RFP
2. Subcontractors
p-two subs listed with required info
p-Diona; proven mobile technology
3. Organizational Chart
i-only four names, three are key
i-appears basic, but has Advisory Board
4. Litigation
m-disclaimer and didn't answer RFP
5. Financial Viability
p-D&B report within a year (7/25/18)
p-D&B rating 5A3
p-JP Morgan relationship for 71 years-satisfactory
m-only two pages of D&B; not whole report
p-Surety bond for single project of \$100M/aggregate of \$400M
6. Licensure/Certification
p-professional certifications of three key individuals
m-no mention of company certifications (ISO, etc)
7. Certificate of Insurance
p-\$15M General liability; \$5M Workman's Comp; \$10M Professional liability;
q-no cyber liability? \$5M due by IPoP

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: International Business Machines Corporation (IBM)

DATE: 6/21/2019

EVALUATOR: Daniel Lynch

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
p-facility to be operated in central Maine
B. CCWIS Functionalities and Priorities
p-web and mobile; SaaS/COTS; cloud based
p-built upon Social Program Management platform (Java)
p-supports IV-E requirements
p-bidirectional with other systems (CS, TANF, MaineCare) Advantage?
p-“ready to use” based on experiences with other clients
p-Agile approach for Maine
p-Fully delivery w/in 18 mos; core solutions w/in 10 mos of start
p-multiple data based reports for different levels
C. CCWIS Document Repository Expectations
i-cloud based content management and file sharing
i-files can be date based or version number to indicate version
D. Management Approach
p-rapid 10 mos IOC
p-Agile management strategy with sprint-based configuration development
i-M&O after 10 mos
p-project work plan of plans: staff, document, Issue, risk management, CCWIS compliance
E. CCWIS Hosting
i-hosted on IBM Cloud
F. CCWIS Technical Requirements
G. Operations and Maintenance
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: International Business Machines Corporation (IBM)

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services

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Individual Evaluator Comments: Notes taken on 6/21/2019 Section I

Part IV.B. Section I
1. Overview of the Organization
<p>Watson Health is a division of IBM that is focused on building systems that support health and human services. They have a strategic focus of introducing augmented intelligence into the human services business processes. Their solution is called "The IBM Solution for Child Welfare" This solution has been implemented globally providing support for 20,000 case workers handling over 350, cases. The proposed team of key staff (3) have 65 years of combined CPS experience, Federal ACF experience, State child welfare caseworker experience. They use an agile approach to project development and implementation. They recommend out of the box functionality to simplify upgrades and reduce on-going enhancement have data conversion experience and support twenty states with decision support and data warehouse needs. Their sample projects included: Project 1 North Carolina's, NC FAST program. Currently live in eleven counties as part of a phased deployment strategy. and one of multiple implementations replacing 19 legacy systems. Most of the modules we are looking for are part of this implementation. They don't describe the modules for assessment and service planning, so I'm not sure if those modules are part of their implementation. They provide a project overview and describe system capabilities of the CPS system which includes support for the full life cycle of client interaction. It is an on premis install. Project 2 Ontario Canada's Ministry of Children and Youth Services (Now the Ministry of Children, Community and Social Services). Child Protection Information Network. Watson Health designed, developed and implemented the Case Management component. This is also an on prem solution. This application contains most of the service modules we are looking for. Project 3 Freie und Hansestadt's JUS-IT. A solution based on the IBM Solution for Child Welfare. It is also an on prem solution that includes intake, case management, legal, resource management, financial management, and reporting modules. They list a fourth project: Nevada's Automated Case Management and Eligibility System (ACES) the following service modules were implemented as part of the project: Intake, case management, financial management and reporting. All projects included contact person, phone number and e-mail.</p>
part of an implementation that is replacing 19 legacy systems
2. Subcontractors
Two are listed Diona – (Enterprise mobility software focused), NCCD – Research and consulting services
3. Organizational Chart
<p>Provided. Not clear where accountabilities are aligned. Looks like a Maine Project Manager, an IBM Project Manager and a Project Executive all on the same level. They show and advisory board, but don't show the organizational relationship to them. It appears they are proposing and agile methodology approach. I don't see any Organizational Development/Change Management Lead assigned.</p>

**STATE OF MAINE
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RFP #: 201904061

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DATE:

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DEPARTMENT: Health and Human Services

4. Litigation
No current litigation provided. They provide a link to their annual report citing that an explanation of the material litigation to which IBM is a party is contained in IBMs Annual Report. They also indicate that any matter considered a reportable offense would be disclosed in IBM's 10-K form. A check of the link, which also contained a copy of their 10-K proved to be uneventful in locating any references to any material litigation.
5. Financial Viability
Their D&B Comprehensive Insight Plus Report was provided. As this is not one of my strength areas, I reserve comments at this time. The Bank Reference was provided by J.P. Morgan Chase. It was indicated that a sample bond letter demonstrating their ability to obtain a bond for the initial period of performance can be found in File 3., Attachment 14. File 3, Attachment 14 contained a sample letter form CNA Surety date May 31, 2019
6. Licensure/Certification
Social Worker Certification provided for Joseph Castro business SME. PMP Certifications provide for team members Joseph Castro, Maury Girard and Tom Drennan. SCRUM Certification provided for Maury Girard. IBM Certified Associate Business Process Analyst certification provided for Maury Girard
7. Certificate of Insurance
ACORD Certificate of Liability Insurance provided. There is evidence of General and Professional liability but no evidence of Cyber liability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

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BIDDER NAME: International Business Machines Corporation (IBM)

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services

Part IV.B. Section II Notes Taken on 6/23//2019 Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
IBM will provide a location in central Maine that houses our team to support the implementation and provide ongoing support of the Maine CCWIS. Staff availability will be Monday through Friday 8 am to 5 pm except for State Holidays and Administrative closings.
B. CCWIS Functionalities and Priorities
Watson Health is a Cloud Web based Solution as a Service. With a mobile component. It was designed by Watson Health staff who worked directly with the Agency for Children and Families (ACF). Many have child welfare caseworker and supervisory experience. Within 10 months the following life cycle components would be available from day one of implementation: Intake, Investigation, Case Management, Collaboration, Legal, Resource Management. The solution is built on n-tier, Java EE technical architecture. They provide compliance specifics with CCWIS eligibility requirements 1533.52-53. They contend that their agile approach accelerates or 30-month implementation time frame by 1 year and can deploy full functionality within 18 months. They cite their work on the North Caroline engagement where they rolled out an end to end CCWIS guidelines-based solution in 22 months and that we can benefit from the reuse functionality that has already been deployed
C. CCWIS Document Repository Expectations
Watson Health (WH)will host a Box site, a cloud content management and file sharing service with an established folder structure that will allow WH and Maine to easily share files
D. Management Approach
WH proposes an Agile strategy approach the leverages SDLC best practices. They contend that using this methodology we could deploy a complete end to end child welfare life cycle within 10 months. Post implementation they would focus on delivering OCFS specific business rules and workflows into life cycle within 18 months through sprints managed by SCUM teams and an Advisory board. They would leverage pre-existing plans from similar Child Welfare implementations to assist with timeframes
E. CCWIS Hosting
The proposed hosting is on the IBM Cloud as a service to the State. Watson Health would maintain, operate, and monitor the service for the production and nonproduction environments within the IBM Cloud.
F. CCWIS Technical Requirements
They provide a high-level solution for each of the CCWIS System requirements, but that doesn't explain the architecture associated with how this will be done. I think the information provided within the CCWIS Functionalities and Priorities gives us a good sense of how the technical requirements would be achieved. They provide detailed information relative to each of the proposed module and proposed Structured Decision-Making Assessments the will be created to support the child welfare life cycle. They provide a link to their accessibility and usability policies. They provide their process for data migration and data quality check post migration. Their proposed CCWIS Data Warehousing solution seems to include all the areas

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DEPARTMENT: Health and Human Services

	and functionality we would need. I like the fact that they include Operational Readiness in their proposal. The proposes solution supports a range of approaches to enable informational exchanges of information between internal and external systems.
G. Operations and Maintenance	
	WH is providing SOM a complete support model on the IBM Cloud, except for the SOM Oracle ESB. Their solution is SOA based and configured for load balancing and redundancy along with monitoring tools. They will comply with SOC 2 Type 2 security audit parameters. The solution will meet a 24-hour Recovery Point Objective (RPO) with back ups at an off-site location at least 100 miles from production in an encrypted format. They will conduct an annual DR test.
H. Software Ownership and Application Transfer	
	At the end of the contract, WH will the requirement to provide the State CCWIS data to the Department or its designated agent in a format specified by the department, accompanied by a detailed complete data dictionary will provide a Transition Plan should there be a successor contractor in the future.
I. Staffing Requirements	
	WH will comply with SOM OIT security policy at project onset and before initiation. They will provide oversight to their sub-contractors Diona, and NCCD. SOM will need to assign a team of SMEs with backups that support all modules to be implemented plus Interface, Data, and Oracle Enterprise Service Bus SMEs. They provide individual BIOs for their Key project personnel, Alex, Livesey (Project Executive), Maury Girard (PM), Joseph Castro (Business SME), Tom Drennan (BA), Bill Myers (Executive Advisor), Karen Rewalt (CW Offering Owner), Evy Torres (Sr Child Welfare Solution Specialist), Gloria Walker (Sr Child Welfare State and Federal Government Advisor), Alan Karatas (Sr Agile Advisor), Deirdre O'Connor (NCCD Children Research Center). They provide all job description in attachment 10 and Key personnel resumes in attachment 11.
2. Initial Performance Period Summary Level Plan	
	WH proposes a full implementation of the SOM CCWIS to completed in 48 months.
3. Technical Solution – Including Licensing and Integration Information	
	Here WH summarizes the technical solution that was detailed in I.B.1 of their proposal. The summary includes a recap of Meeting Federal CCWIS Reqs., Meeting State Reqs. to support OCFS CWP, Software functionality, Software Incorporating Legacy System Data, User Manual Summary and Development approach, Hosting services, Maintenance Process, and Training plan. They include an Architecture diagram that depicts their proposed multi-channel access and presentation, logical three tier architecture, application layer, IBM Child Care solution, Security considerations, BI information, Mobile strategy (Diona), Document management, data layer, IBM DB2 (data management product), IBM data warehouse, integration layer, Oracle ESB, and IBM VPN

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: International Business Machines Corporation (IBM)

DATE: 6/18/19 & 6/25/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

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Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
Experience with CCWIS in multiple states, for 282k case workers, hundreds of years of child welfare experience, ACF experience, Agile, 20 states use data warehousing, leader in analytics, experience converting HHS systems Provided 4 references with some relevance Project 1: NC- implementation partner, live in 11 counties, CCWIS ready to align with federal guidelines, custom enhancements available to ME Project 2: Ontario – centralized platform, case management Project 3: Germany – child welfare. Child support P-has depth of experience with CCWIS in multiple states and other settings, expert in data warehousing and analytics, experience with HHS and ACF.
2. Subcontractors
Diona – mobility solutions NCCD – Child welfare research
3. Organizational Chart
Provided. Aligned with Maine positions P- Includes project executive, architect, advisory Board m- technical roles not named
4. Litigation
Discloses to SEC quarterly and in annual report. Not in any lawsuit that will affect its ability to perform the services
5. Financial Viability
Summary D&B – low risk rating and good financial condition Bond letter provided in attachment 14
6. Licensure/Certification
Staff have PMP, LCSF, IBM certifications
7. Certificate of Insurance
Provided 5/21/19 – 20; will need to prove cyber liability included if Bidder awarded.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Meets requirement
B. CCWIS Functionalities and Priorities
10 months to replace MACWIS Built on Social Program Management platform, Java, business processes, APIs, ready to use with minimum configuration P -Express rules for business rules – with prebuilt rules Cloud based managed service Agile – full deployment in 18 months Workflow process definition tool
C. CCWIS Document Repository Expectations
Box site – cloud content – transfer data at end of contract
D. Management Approach
Use OOTB base functionality 2week sprints, leverage NC implementation Executive advisory board
E. CCWIS Hosting
IBM cloud, with VPN for applications not applicable to public users
F. CCWIS Technical Requirements
Meets requirements but does not provide many details or specifics Integrate with Oracle ESB Ready made mobile solution Reporting has child welfare specific data model P Configurable workflows and prebuilt features SSO, connected to Active Directory – 1000 users NIST 800-53 controls Will meet OIT policies .. unix and windows where applicable JAD sessions referenced in change management but not clear if it is part of configuration or how it fits implementation approach P Safemeasures – state of the art reporting methodology, leverage methodology, dashboards , standard track common benchmarks set of reports P data quality -identify missing data, Watson AI for unstructured data Cognos and tableau – can use existing BI capabilities IBM ETL Security not addressed

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EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

G. Operations and Maintenance
Solution as a service - meets requirements Dallas and DC sites
H. Software Ownership and Application Transfer
Meet requirement to provide data System transfer not indicated
I. Staffing Requirements
P -Team from NC reference project including PM P advisory team – Child welfare Offering Owner, ACF participates with IT advisory; product specialist
2. Initial Performance Period Summary Level Plan
State meet requirements Plan is very high level
3. Technical Solution – Including Licensing and Integration Information
Addressed in prior sections

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: Lynch
EVALUATOR DEPARTMENT: JMS sc

Alex Livesey
Kew Murphy

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
<p style="text-align: right;">Access 1st 10 mos. - NC CW project</p> <p>- list of all cases, how they - Dashboard - contacts, current cases, appointments, renew. - integrated w/ M. Outlook - Customizable DB - Ad hoc Analytics</p>
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ✓ ○ Receive documents ○ Complete or review a plan/assessment/release of information ✓ ○ Offline activity ✓ ○ Service authorization
<p>Signatures auto populate offline w/ downloaded docs or offline notes</p>
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
<p>USES CRC SDM - provide recommendations & notify supervisor</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: Dan Lynch

EVALUATOR DEPARTMENT:

- Demonstrate how the system supports Court activities:
 - Interface ✓
 - Keep track of and notify case worker of upcoming hearing ✓
 - Produce discovery
 - Support redaction of documents ✓
 - Produce court notifications

*Case Management system
Adding participants allows access*

- Demonstrate how the electronic document management function integrates with the system:
 - Entry
 - Storage
 - Export
 - Recall

*Metadata
- Redact info*

- Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.

*Resource & Placement Module -
Licenses tracked - Can update
Training*

- Give an example of how supervisors can use data collected to make decisions.

STATE OF MAINE
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DATE: July 9, 2019

EVALUATOR NAME: Dan Lynch

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<p>Eligibility for IV-E - Will show where data is missing for IV-E with state. - Funding resource authority subject of appropriate } in P.C.</p>
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<p>List of Financials Separate Financials (state, child, ESB) Recor SOB -</p>
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: Gina Googins

EVALUATOR DEPARTMENT:

- Demonstrate how the system supports Court activities:
 - Interface
 - Keep track of and notify case worker of upcoming hearing
 - Produce discovery
 - Support redaction of documents
 - Produce court notifications

*Experienced to create a court/cw interface
showed.*

- Demonstrate how the electronic document management function integrates with the system:
 - Entry
 - Storage
 - Export
 - Recall

showed.

- Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.

*demonstrated family matching
placement open
demo options*

train, payment in the system

- Give an example of how supervisors can use data collected to make decisions.

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: Gina Grogins

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<p><i>automated.</i> <i>Sharing CP and family plans</i> <i>See cost of services</i> <i>can see status of payments.</i></p>
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:
<p><i>Print capacity -</i> <i>Decrease</i></p> <p>/</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: Jenna Joecket

EVALUATOR DEPARTMENT:

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<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards 	<p>NEED SDM ; Automatically populates history.</p>
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization 	<p>Diona mobile investigation app can be read out loud from app -tapping speaker. *Offline capability Multiple ways to enter data; case notes *ongoing Can attach videos, photos +audio to case notes contacts due Electronic signature</p>
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system. 	<p>NEED SDM-</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: Jenna Joeckel

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none">○ Interface○ Keep track of and notify case worker of upcoming hearing○ Produce discovery○ Support redaction of documents○ Produce court notifications
Implemented Case Print Court Interface
<ul style="list-style-type: none">• Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none">○ Entry○ Storage○ Export○ Recall
Multidisciplinary teams - POAEO
<ul style="list-style-type: none">• Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
Can search by provider characteristics
<ul style="list-style-type: none">• Give an example of how supervisors can use data collected to make decisions.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: *Terna Joekal*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<i>Financial Suite Reports when payment has been processed + issued</i>
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER NAME: International Business Machines Corporation
DATE: July 9, 2019
EVALUATOR NAME:
EVALUATOR DEPARTMENT:

Instructions: The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Communications <input checked="" type="checkbox"/> Reminders <input checked="" type="checkbox"/> Calendar Appointment <input checked="" type="checkbox"/> Dashboards
clean Simplistic
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Collect signatures <input checked="" type="checkbox"/> Receive documents <input checked="" type="checkbox"/> Complete or review a plan/assessment/release of information <input checked="" type="checkbox"/> Offline activity <input type="checkbox"/> Service authorization
Have to take out records for offline activity
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
SDM

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: *Bob Blanchard*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Interface<input checked="" type="checkbox"/> Keep track of and notify case worker of upcoming hearing<input checked="" type="checkbox"/> Produce discovery<input checked="" type="checkbox"/> Support redaction of documents<input checked="" type="checkbox"/> Produce court notifications
<p><i>- Office connected</i> <i>1 Document</i></p>
<ul style="list-style-type: none">• Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none"><input checked="" type="checkbox"/> Entry<input checked="" type="checkbox"/> Storage<input checked="" type="checkbox"/> Export<input checked="" type="checkbox"/> Recall
<p><i>Document</i></p>
<ul style="list-style-type: none">• Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
<ul style="list-style-type: none">• Give an example of how supervisors can use data collected to make decisions.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

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BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: *Bob Blanchard*

EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">◦ Example – Tracking placements of children
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">• Other Observations:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Welfare Information System

BIDDER NAME: International Business Machines Corporation

DATE: July 9, 2019

EVALUATOR NAME: Jenny Dillihunt Brown

EVALUATOR DEPARTMENT: OCFS

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

<ul style="list-style-type: none">• Demonstrate any automated case worker activities:<ul style="list-style-type: none">○ Communications○ Reminders<ul style="list-style-type: none">○ Available on dashboard○ Calendar Appointment<ul style="list-style-type: none">○ Integrated with Microsoft Office○ Dashboards<ul style="list-style-type: none">○ Mobile dashboard for caseworker contains important demographic information easily accessible to the caseworker
<ul style="list-style-type: none">• Demonstrate field activities being complete on the mobile platform of the solution:<ul style="list-style-type: none">○ Collect signatures<ul style="list-style-type: none">○ Electronic signatures enabled○ Receive documents<ul style="list-style-type: none">○ Photos, documents, videos taken while logged into a particular assessment/case are labeled as belonging to that assessment/case○ Complete or review a plan/assessment/release of information<ul style="list-style-type: none">○ Information release items configurable○ Offline activity<ul style="list-style-type: none">○ Can download case info to device to be used when offline, when back online, system updates automatically○ Can enter information in notes while offline utilizing the touch screen of mobile device, speech to text, stylus○ Service authorization
<ul style="list-style-type: none">• Demonstrate decision making tools in your system.<ul style="list-style-type: none">• SDM is fully embedded in this solution.
<ul style="list-style-type: none">• Demonstrate how the system supports Court activities:<ul style="list-style-type: none">○ Interface<ul style="list-style-type: none">○ Has created prior interfaces○ Keep track of and notify case worker of upcoming hearing

**STATE OF MAINE
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EVALUATOR DEPARTMENT: OCFS

<ul style="list-style-type: none">○ Produce discovery<ul style="list-style-type: none">○ Utilizes Case Print to produce discovery○ Support redaction of documents○ Produce court notifications
<ul style="list-style-type: none">● Demonstrate how the electronic document management function integrates with the system:<ul style="list-style-type: none">○ Entry○ Storage○ Export○ Recall
<ul style="list-style-type: none">● Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.<ul style="list-style-type: none">● Can search by specialties● Demonstrated documentation of training & license renewal
<ul style="list-style-type: none">● Give an example of how supervisors can use data collected to make decisions.<ul style="list-style-type: none">● Supervisory approval of intake report demonstrated
<ul style="list-style-type: none">● Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">○ Example – Tracking placements of children○ Demonstrated ad hoc report of Intakes
<ul style="list-style-type: none">● Demonstrate operability with financial management system.<ul style="list-style-type: none">● Example of payment for placement via State Oracle ESB
<ul style="list-style-type: none">● Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none">● Other Observations:<ul style="list-style-type: none">● Auto population of participant history is an asset● Solution visuals are clear and easy to follow (no visual clutter)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System
BIDDER NAME: International Business Machines Corporation
DATE: July 9, 2019
EVALUATOR NAME: Hazel Stevenson
EVALUATOR DEPARTMENT: Admin and Finance

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
Integration with Outlook
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization
Always requires login to mobile device Speaker function and audio recording capability Demonstrated signature Offline – capture info and uploads when back online
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
<ul style="list-style-type: none"> • Demonstrate how the system supports Court activities: <ul style="list-style-type: none"> ○ Interface ○ Keep track of and notify case worker of upcoming hearing ○ Produce discovery ○ Support redaction of documents ○ Produce court notifications
Integrate with Case print
<ul style="list-style-type: none"> • Demonstrate how the electronic document management function integrates with the system: <ul style="list-style-type: none"> ○ Entry ○ Storage ○ Export

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

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BIDDER NAME: International Business Machines Corporation

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EVALUATOR NAME: Hazel Stevenson

EVALUATOR DEPARTMENT: Admin and Finance

<ul style="list-style-type: none"> ○ Recall
Info can be redacted based on security roles
<ul style="list-style-type: none"> • Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.
Integrate with providers from resource management system
<ul style="list-style-type: none"> • Give an example of how supervisors can use data collected to make decisions.
<ul style="list-style-type: none"> • Demonstrate analytic tool specifically the ability to develop ad hoc data. <ul style="list-style-type: none"> ○ Example – Tracking placements of children
Demonstrated ease of use ad hoc drag and drop
<ul style="list-style-type: none"> • Demonstrate operability with financial management system.
Use State Oracle ESB to submit payment to financial system.
<ul style="list-style-type: none"> • Staff professional development tracking training, conferences, performance management
<ul style="list-style-type: none"> • Other Observations:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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 BIDDER NAME: International Business Machines Corporation
 DATE: July 9, 2019
 EVALUATOR NAME: Gil Ouellette
 EVALUATOR DEPARTMENT:

Instructions: The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.

Presentation based on their North Carolina Child Welfare Solution

<ul style="list-style-type: none"> • Demonstrate any automated case worker activities: <ul style="list-style-type: none"> ○ Communications ○ Reminders ○ Calendar Appointment ○ Dashboards
They were able to demonstrate case worker activities flow
<ul style="list-style-type: none"> • Demonstrate field activities being complete on the mobile platform of the solution: <ul style="list-style-type: none"> ○ Collect signatures ○ Receive documents ○ Complete or review a plan/assessment/release of information ○ Offline activity ○ Service authorization
Offline activity done through DIONA – which allows for reports to be read to you. This would prove helpful while driving to a client
<ul style="list-style-type: none"> • Demonstrate decision making tools in your system.
Presentation made this look simple with the ability to easily create a holistic all inclusive final report
<ul style="list-style-type: none"> • Demonstrate how the system supports Court activities: <ul style="list-style-type: none"> ○ Interface ○ Keep track of and notify case worker of upcoming hearing ○ Produce discovery ○ Support redaction of documents ○ Produce court notifications
No comments to this section
<ul style="list-style-type: none"> • Demonstrate how the electronic document management function integrates with the system: <ul style="list-style-type: none"> ○ Entry ○ Storage ○ Export ○ Recall
No comments to this section
<ul style="list-style-type: none"> • Demonstrate Resource module including how it will match families to children, tracking the licensing process and training of resource parents.

**STATE OF MAINE
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EVALUATOR DEPARTMENT:

<ul style="list-style-type: none">• Give an example of how supervisors can use data collected to make decisions.
No comments to this section
<ul style="list-style-type: none">• Demonstrate analytic tool specifically the ability to develop ad hoc data.<ul style="list-style-type: none">o Example – Tracking placements of children
No comments to this section
<ul style="list-style-type: none">• Demonstrate operability with financial management system.
Would connect to our state financial system through our ORACLE ESB
<ul style="list-style-type: none">• Staff professional development tracking training, conferences, performance management
No comments to this section
<ul style="list-style-type: none">• Other Observations:
Their presentation made all modules look easy to navigate and pull information from.

**STATE OF MAINE
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RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: June 19, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
<ul style="list-style-type: none"> • Aces business modernization • Indiana is the qualifying project • Kris CCWIS- powered by casebook • SAAS
2. Subcontractors
Included- very detailed and complete
3. Organizational Chart
Included
4. Litigation
Not provided
5. Financial Viability
Not provided
6. Licensure/Certification
Not provided
7. Certificate of Insurance
Included

**STATE OF MAINE
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RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: June 19, 2019

EVALUATOR: Robert Blanchard

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
I did not see this addressed
B. CCWIS Functionalities and Priorities
Deployed in 16 months
C. CCWIS Document Repository Expectations
KPMG Central
Intergrated with Office
D. Management Approach
Agile Based incremental software
Essential SAFe
E. CCWIS Hosting
Hosted in AWS
F. CCWIS Technical Requirements
<ul style="list-style-type: none"> • S3 Document storage- not sure what that means • Form development tools included • Performs on multiple platforms • Includes all federal reports • Will create new federal reports at no charge as part of SLA • Innovative interface • Detailed case notes and integrated documents • No NEICE • Placement matching • Integrated with Office 365 • Data Lake
G. Operations and Maintenance
Casebook is an ongoing service and KPMG provides other support?
H. Software Ownership and Application Transfer
<ul style="list-style-type: none"> • Data only for SaaS components • Full ownership for non casebook components
I. Staffing Requirements
<ul style="list-style-type: none"> • Included
2. Initial Performance Period Summary Level Plan
<ul style="list-style-type: none"> • Included but I am not sure if I understand it

**STATE OF MAINE
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DEPARTMENT: Health and Human Services

<ul style="list-style-type: none">• Diona Moble hooks to MACWIS- not sure why it is in here?• Provided 3 optional services outside of RFP request.
3. Technical Solution – Including Licensing and Integration Information
<ul style="list-style-type: none">• Separation of the two partners, they are not proposing a single solution but two parts.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
 RFP TITLE: Maine Comprehensive Child Support Information System
 BIDDER NAME: KPMG LLP
 DATE: June 21, 2019 (final save June 24, 2019)
 EVALUATOR: Jenny DillihuntBrown
 DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
Self-proclaimed leader in integration of HHS programs for increased efficiency & effectiveness - ? CW implementation
? years of experience w/CW agencies
ACES Business Rules Engine Modernization (ME DHHS, OFI, OIT)
2. Subcontractors - 6
Casebook PBC – software, SaaS solution
Portland Webworks – data migration
Maine Information Network – testing, technical helpdesk
Mathematica Policy Research – policy support, data profiling & CCWIS compliance
Diona – mobility solutions (optional)
Northwoods - ?? Traverse technology (optional)
3. Organizational Chart - Provided
4. Litigation – None provided
5. Financial Viability – Dun & Bradstreet Comprehensive Insight Plus report not provided, letter of reference & surety provided.
6. Licensure/Certification – Registered w/ME business license, no other org licensure/certification required.
7. Certificate of Insurance - Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: June 21, 2019 (final save June 24, 2019)

EVALUATOR: Jenny DillihuntBrown

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
B. CCWIS Functionalities and Priorities
C. CCWIS Document Repository Expectations
D. Management Approach
E. CCWIS Hosting
F. CCWIS Technical Requirements
G. Operations and Maintenance
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Support Information System
BIDDER NAME: KPMG LLP
DATE: June 24, 2019
EVALUATOR: Gina Googins
DEPARTMENT: Health and Human Services

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Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization - has worked with Maine in the past on ACES. KRIS-CCWIS, states child welfare experience in multiple states; however, references do not reflect this. Long standing work with Maine. State Casebook Q ownership of this program. AWS cloud. worked with Maine on ACES.
2. Subcontractors - 6 different subcontractors – Q as to what this company is going to do?
3. Organizational Chart - Not showing project manager, subject manager?
4. Litigation - did not answer the question
5. Financial Viability – did not produce the report
6. Licensure/Certification – did not produce the actual document.
7. Certificate of Insurance - met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: June 24, 2019

EVALUATOR: Gina Googins

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
B. CCWIS Functionalities and Priorities
C. CCWIS Document Repository Expectations
D. Management Approach
E. CCWIS Hosting
F. CCWIS Technical Requirements
G. Operations and Maintenance
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
 RFP TITLE: Maine Comprehensive Child Support Information System
 BIDDER NAME: KPMG LLP
 DATE: 6/24/2019
 EVALUATOR: Daniel Lynch
 DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
p-Experience with State of Maine (Aces)
q-does submission meet RFP? Company more like general contractor
q-"Ref" has a gmail address?
2. Subcontractors
i-multiple subs; of six provided, two are for "optional" services—not to be considered IAW RFP
3. Organizational Chart
p-well developed; lots of names with backgrounds
i-many "key personnel"
4. Litigation
m-didn't respond to RFP. Standard disclaimer
5. Financial Viability
i-no D & B, but does have a DUNs number?
p-Surety for \$25M for single project; \$100M for aggregate
6. Licensure/Certification
m-"We're good," you don't need to worry. Does not meet RFP
7. Certificate of Insurance
p-\$1M General Liability, Workman's Comp; \$5M Professional Liability
m- no mention of cyber

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: 6/24/2019

EVALUATOR: Daniel Lynch

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
B. CCWIS Functionalities and Priorities
C. CCWIS Document Repository Expectations
D. Management Approach
E. CCWIS Hosting
F. CCWIS Technical Requirements
G. Operations and Maintenance
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services

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Individual Evaluator Comments: Notes Taken on 6/21/2019 Section I

Part IV.B. Section I
1. Overview of the Organization
KPMG LLP is the U.S. member firm of KPMG International. They list deep experience in the HHS domain, citing strong child welfare experience with current engagements in Pennsylvania, Connecticut, Florida, Texas, New York and New York City to name a few. More of their qualifications and Skills are discussed as part of the various initiatives they have worked and participated with. These include systems integration, technical advice, child welfare subject matter expertise, policy and practice oversight, architecture definition, policy and technical design, configuration, testing, UAT support, training, Knowledge transfer, infrastructure support, SDLC support, Project Management support, status reporting, risk management, schedule development, gap analysis, quality assurance support, RFP development, stake holder assessment, and communications strategy and plan implementation.. They include a section that shows that relevant services have been provided to 10 states including Maine. Project examples include: Project 1. The state reference - Casebook implementation in Indiana whose most recent module went live in 2015 included or integrates with the services we are looking for. They provide a good overview and description of the CPS capabilities that include making it the system of record for the numerous child welfare business processes from investigations to placements, court interactions to federal reporting and has led to an increase of recorded face to face contact with the family case managers, a large increase in recorded weekly parent visits, and a 28% increase in children placed with relatives. The Casebook solution was implemented as SaaS model, hosted in the secure AWS Cloud. 2. The ACES Business Rule Engine Modernization project with OFI in the state of Maine. Project 3. The Medicaid Eligibility and Enrollment solution for Hawaii. For this project they provided system implementation project management, requirements design and acceptance, training, managed infrastructure and IT Operations support, Help Desk support, federal and state policy compliance. All three included contact person, phone number and e-mail address.
2. Subcontractors
They identify 6 Casebook PBC – SaaS Solution and configuration changes, Portland Webworks – Data Migration, Maine Information Network – Testing and Technical helpdesk, Mathematica Policy Research -policy support to include data profiling and CCWIS compliance, Diona – standalone mobility solution, Northwoods – case discovery (I believe there is a typo in the RFP as Diona is listed in the Northwoods description)
3. Organizational Chart
No C level organization Chart. What they provide has a top-level triumvirate with a project manager and PMO lead on the same level reporting up to an Engagement Managing Director who reports up to the Engagement Principal. Below the Project Manager and PMO lead is a five-track defined set of resources. It's hard to discern who reports to who and I don't see and Organizational

**STATE OF MAINE
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DEPARTMENT: Health and Human Services

Development/Change Management resources. This is further compounded by the fact that 6 subcontractors are included in the project with no sense of who they report to and where they fit in with the 5 tracks.
4. Litigation
None provided. They state that they have a professional indemnity insurance program in place to insure against such risks and that they have no pending litigation that would materially affect the firm's operations or their ability to perform services for us.
5. Financial Viability
Response is that they are not tracked by D&B They provide 3 bank references from JP Morgan, US Bank, and PNC Bank. They provide a letter of representation from the Westchester Fire Insurance Company regarding surety bonding who state that they would give favorable consideration to providing required performance and payment bonds.
6. Licensure/Certification
None provided with a statement that they hold all required registrations to implement the scope of work but would provide should we require it.
7. Certificate of Insurance
ACORD Certificate of Liability Insurance provided with evidence of General liability. AON Summary of Insurance letter provided with evidence of Professional Indemnity Insurance. No evidence of Cyber liability on either document.

**STATE OF MAINE
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BIDDER NAME: KPMG LLP

DATE:

EVALUATOR: Gilman Ouellette

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
B. CCWIS Functionalities and Priorities
C. CCWIS Document Repository Expectations
D. Management Approach
E. CCWIS Hosting
F. CCWIS Technical Requirements
G. Operations and Maintenance
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: 6/21/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
HHS practice with SACWIS and CCWIS experience, SOM experience, modernizations of child welfare with experience in multiple states, NY award 207K professionals, internal research arm Project 1: IN, in production, Agile, CCWIS ready, 4000 users, Casebook, SAAS Project 2: SOM DHHS Business rules engine, prime, requirements gathering Project 3: HI, integrated eligibility, prime, CRM P -broad experience with child welfare implementations in several states, large HHS practice and experience with transformation and implementations, ME experience including successful implementation ? Only one reference for child welfare, although 10 states listed
2. Subcontractors
Casebook - SAAS Portland web works Maine Information Network P- current Maine digital government partner Mathematica Diona Northwoods (optional) [24]7.ai alliance AWS alliance P broad team expertise, Casebook in more than 1 state
3. Organizational Chart
P Includes exec level, multiple tracks to support agile approach M – does not show architect role
4. Litigation
No details; none pending that affects ability to perform services
5. Financial Viability
D&B not provided, private partnership; state company has good credit rating; evidence of financial strength provided and bank and trade references provided. Bond letter provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: 6/21/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

6. Licensure/Certification
DE based, registered in ME with business license
7. Certificate of Insurance
Professional liability includes cyber liability. Dated 6/1/18 – 19. Expired – will need to be current if awarded.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: 6/21/19

EVALUATOR: Hazel Stevenson

DEPARTMENT: Admin and Finance

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
B. CCWIS Functionalities and Priorities
C. CCWIS Document Repository Expectations
D. Management Approach
E. CCWIS Hosting
F. CCWIS Technical Requirements
G. Operations and Maintenance
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Support Information System
BIDDER NAME: KPMG LLP
DATE: June 22, 2019
EVALUATOR: Jenna Joeckel
DEPARTMENT: Health and Human Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Part IV.B. Section I
1. Overview of the Organization
Delaware based company, 153 countries and territories but no child welfare, 207,000 partners and professionals, presence in the State of Maine, Nicholas Scopetta Child Welfare Award, present in multiple states
2. Subcontractors
Multiple subcontractors; optional
3. Organizational Chart
included
4. Litigation
No pending litigation that would impact ability to fulfill contract, confidential
5. Financial Viability
Favorable consideration per their report, not formally rated by Dun & Bradstreet
6. Licensure/Certification
SOS Business License
7. Certificate of Insurance
Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201904061

RFP TITLE: Maine Comprehensive Child Support Information System

BIDDER NAME: KPMG LLP

DATE: June 22, 2019

EVALUATOR: Jenna Joeckel

DEPARTMENT: Health and Human Services

Part IV.B. Section II
1. Services to be Provided
Part II
A. Facility Standards and Operational Requirements
Powered by casebook, 20 year clients with State of Maine, machine learning capabilities
Administrative office in Maine
B. CCWIS Functionalities and Priorities
AWS cloud, under 30 month requirement, integrates with office 365 and other office tools,
Note taking-flexible, free form or structured, multiple points of entry
C. CCWIS Document Repository Expectations
KPMG Central
D. Management Approach
Essential sAfe, vision workshops to meet with stakeholders
E. CCWIS Hosting
AWS cloud
F. CCWIS Technical Requirements
5 Overarching themes, staff training, performance evaluations, and background checks,
reporting gateway, family network view, service referral form, storage and viewing of court
orders as thumbnails next to the proceeding, placement matching
G. Operations and Maintenance ,
H. Software Ownership and Application Transfer
I. Staffing Requirements
2. Initial Performance Period Summary Level Plan
3. Technical Solution – Including Licensing and Integration Information



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 201904061
RFP TITLE: Maine Comprehensive Child Welfare Information System

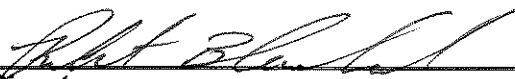
I, Robert Blanchard accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand that the evaluation process is to be conducted in an impartial manner. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the funding decision notices for public distribution.


Signature

7/14/19
Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN SERVICES

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Governor

Jeanne M. Lambrew, Ph.D.
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
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RFP TITLE: Maine Comprehensive Child Welfare Information System

I, Hazel Stevenson, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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H. Stevenson
Signature

6/14/19
Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN SERVICES

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Governor

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Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
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RFP TITLE: Maine Comprehensive Child Welfare Information System

I, Gilman Ouellette, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Gilman Ouellette
Signature

6/14/2019
Date



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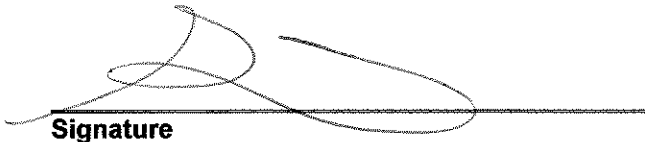
I, Gina Googins, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Signature

6/14/19
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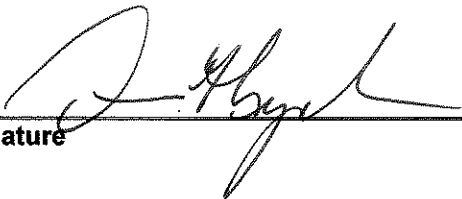
I, Daniel Lynch, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Signature

6/14/2019

Date



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I, Jenny DillihuntBrown, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Jenny Dillihunt Brown
Signature

6/14/19
Date



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DEPARTMENT OF HEALTH AND HUMAN SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner

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I, Jenna Joeckel, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Jenna Joeckel
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6/14/19
Date