**STATE OF MAINE**

**Department of Education**

*Child Development Services*



**RFP# 202505077**

**ERP Accounting Software**

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| *All communication regarding the RFP must be made through the RFP Coordinator.* | | |

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| **Submitted Questions Due Date** | July 9, 2025, no later than 11:59 p.m., local time |
| *All questions must be received by the RFP Coordinator by the date and time listed above.* | |

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| **Proposal Submission Deadline** | **DATE:** | July 24, 2025, no later than 11:59 p.m., local time. |
| **TO:** | [Proposals@maine.gov](mailto:Proposals@maine.gov) |
| *Proposals must be received electronically by the Office of State Procurement Services by the date and time listed above.* | | |

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PUBLIC NOTICE

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**State of Maine**

**Department of Education**

**RFP# 202505077**

**ERP Accounting Software**

The State of Maine is seeking proposals for a cloud-based accounting software system, to accommodate fund accounting, including implementation, training and technical support.

A copy of the RFP and all related documents can be obtained at: <https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps>

Proposals must be submitted to the Office of State Procurement Services, via e-mail, at: [Proposals@maine.gov](mailto:Proposals@maine.gov). Proposal submissions must be received no later than 11:59 p.m., local time, on July 24, 2025. Proposals will be opened the following business day.

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**RFP TERMS/ACRONYMS with DEFINITIONS**

The following terms and acronyms, as referenced in the RFP, have the meanings indicated below:

|  |  |
| --- | --- |
| **Term/Acronym** | **Definition** |
| **ACH** | Automatic Clearing House |
| **ADP** | CDS Payroll company |
| **AP/AR** | Accounts Payable/Accounts Receivable |
| **CDS** | Child Development Services |
| **CINC** | Child Information Network Connection |
| **Confidentiality** | Preserving authorized restrictions on information access and disclosure, including means for protecting confidential or sensitive information. A loss of confidentiality is the unauthorized disclosure of information. |
| **Data Classification** | The process of risk assessment of data. See **Appendix D** for the Data Classification process (see also “PII Confidentiality Impact Level”). |
| **Department** | Department of Child Development Services **(CDS)** |
| **ERP** | Enterprise Resource Planning |
| **OIT** | Office of Information Technology |
| **PII (Personally Identifiable Information)** | Data that is maintained by an agency that could potentially identify a specific individual and needs to be protected in accordance with state and/or federal law, including (1) any information that can be used to distinguish or trace an individual‘s identity, such as name, social security number, date and place of birth, mother‘s maiden name, or biometric records; and (2) any other information that is linked or linkable to an individual, such as medical, educational, financial, and employment information. |
| **PII Confidentiality Impact Level** | The PII confidentiality impact level—low, moderate, or high—indicates the potential harm that could result to the subject individuals and/or the organization if PII were inappropriately accessed, used, or disclosed. (NIST SP 800-122). See **Appendix D**. PII is evaluated to determine its confidentiality impact levels, so that appropriate safeguards can be applied to the PII. |
| **PMP** | Project Management Professional |
| **RFP** | Request for Proposals |
| **SLA** | Service Level Agreement |
| **SLDS** | Statewide Longitudinal Data System |
| **State** | State of Maine |
| **State Data** | Any information originating with the State, regardless of form or medium of disclosure (e.g., verbal, observed, hard copy, or electronic) or source of information. It includes any information concerning the State’s information technology infrastructure, systems and software and procedures; and information originating with the State in the course of using and configuring the Services provided under the contract. It includes any sensitive information held by the State that may be protected from disclosure pursuant to a federal or state statutory or regulatory scheme intended to protect that information, or pursuant to an order, resolution or determination of a court or administrative board or other administrative body. |

**State of Maine**

**Department of Education**

*Child Development Services*

**RFP# 202505077**

**ERP Accounting Software**

**PART I INTRODUCTION**

1. **Purpose and Background**

Child Development Services (CDS) is seeking a cloud-based Financial ERP system to replace the existing Microsoft Great Plains Dynamic system. The new system will streamline fund accounting processes, improve system integration, enhance financial reporting, and automate manual workflows. This Request for Proposals (RFP) document outlines the functional and technical requirements for the new cloud-based Financial ERP system, including installation, training, and technical support. This document provides instructions for submitting proposals, the procedure and criteria by which the awarded Bidder will be selected, and the contractual terms which will govern the relationship between the State of Maine (State) and the awarded Bidder.

CDS’s current ERP system consists of the modules below:

1. **Existing System: Microsoft Great Plains Dynamics**
2. Usability Issues: The system is highly manual and not user-friendly.
3. Limited Access: Only 4 concurrent users can access the Peak Knowledge billing module.
4. Lack of Integration: No integration with external systems like ADP (payroll) and CINC (student information system).
5. Manual Processes:
   1. Manual data is uploaded for payroll processing.
   2. Manual extraction and processing of financial data from CINC.
   3. Reliance on DocuSign for payment approvals.
6. Limited Reporting: Financial reporting is constrained, relying on manually uploaded files from CINC.
7. **Current Workflow and Pain Points**
8. Accounts Payable (Non-CDS Employees):
   1. Manual retrieval of agency reports from CINC.
   2. Manual invoice loading and batch processing in Great Plains.
9. Accounts Receivable:
   1. Service logs are exported from CINC to manually generate billing sheets.
   2. Data is processed in Excel and uploaded into PKHBS for 837P file generation.
   3. Claims are manually loaded into EZ Claims and submitted to Trizetto.
10. **General Provisions**
    1. From the time the RFP is issued until award notification is made, all contact with the State regarding the RFP must be made through the RFP Coordinator. No other person/ State employee is empowered to make binding statements regarding the RFP. Violation of this provision may lead to disqualification from the bidding process, at the State’s discretion.
    2. Issuance of the RFP does not commit the Department to issue an award or to pay expenses incurred by a Bidder in the preparation of a response to the RFP. This includes attendance at personal interviews or other meetings and software or system demonstrations, where applicable.
    3. All proposals must adhere to the instructions and format requirements outlined in the RFP and all written supplements and amendments (such as the Summary of Questions and Answers), issued by the Department. Proposals are to follow the format and respond to all questions and instructions specified below in the “Proposal Submission Requirements” section of the RFP.
    4. Bidders will take careful note that in evaluating a proposal submitted in response to the RFP, the Department will consider materials provided in the proposal, information obtained through interviews/presentations (if any), and internal Departmental information of previous contract history with the Bidder (if any). The Department also reserves the right to consider other reliable references and publicly available information in evaluating a Bidder’s experience and capabilities.
    5. The proposal must be signed by a person authorized to legally bind the Bidder and must contain a statement that the proposal and the pricing contained therein will remain valid and binding for a period of 180 days from the date and time of the bid opening.
    6. The RFP and the awarded Bidder’s proposal, including all appendices or attachments, will be the basis for the final contract, as determined by the Department.
    7. Following announcement of an award decision, all submissions in response to this RFP will be public records, available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA) ([1 M.R.S. § 401](https://gcc02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fwww.mainelegislature.org%2Flegis%2Fstatutes%2F1%2Ftitle1sec401.html&data=05%7C02%7CJohn.F.Spier%40maine.gov%7C74b0a21ff26b425135b908dcde5d1600%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638629740077530255%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=yYGRZvqRpIJa6dPB35CzUZRcmiZ%2BMICiBNs0EIsJu78%3D&reserved=0) et seq.).  State contracts and information related to contracts, including bid submissions, are generally public records per FOAA.
    8. In the event that a Bidder believes any information that it submits in response to this RFP is confidential, it must mark that information accordingly, and include citation to legal authority in support of the Bidder’s claim of confidentiality.  In the event that the Department receives a FOAA request that includes submissions marked as confidential, the Department shall evaluate the information and any legal authority from the Bidder to determine whether the information is an exception to FOAA’s definition of public record.  If the Department determines to release information that a Bidder has marked confidential, it shall provide advance notice to the Bidder to allow for them to seek legal relief.
    9. The Department, at its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to the RFP.
    10. All applicable laws, whether or not herein contained, are included by this reference. It is the Bidder’s responsibility to determine the applicability and requirements of any such laws and to abide by them.
11. **Contract Term**

The Department is seeking cost-efficient proposals to provide services, as defined in this RFP, for the anticipated contract period defined in the table below. The dates below are estimated and may be adjusted, as necessary, in order to comply with all procedural requirements associated with the RFP and the contracting process. The actual contract start date will be established by a completed and approved contract.

Contract Renewal: Following the initial term of the contract, the Department may opt to renew the contract for four (4) renewal periods, as shown in the table below, and subject to continued availability of funding and satisfactory performance.

The term of the anticipated contract, resulting from the RFP, is defined as follows:

|  |  |  |
| --- | --- | --- |
| **Period** | **Start Date** | **End Date** |
| Initial Period of Performance | 09/01/2025 | 08/31/2027 |
| Renewal Period #1 | 09/01/2027 | 08/31/2029 |
| Renewal Period #2 | 09/01/2029 | 08/31/2031 |
| Renewal Period #3 | 09/01/2031 | 08/31/2033 |
| Renewal Period #4 | 09/01/2033 | 08/31/2035 |

1. **Number of Awards**

The Department anticipates making one (1) award as a result of this RFP process.

**PART II SCOPE OF SERVICES TO BE PROVIDED**

Under the supervision of CDS, the awarded Bidder will be responsible for providing and maintaining a cloud-based platform that encompasses the desired features outlined below. Please note that these features represent our ideal requirements and may be adjusted depending on the awarded Bidder’s solution and recommendations. The go live date is anticipated to be July 1, 2026.

The new ERP system will:

* Replace the existing Microsoft Great Plains Dynamics system.
* Integrate with external systems such as CINC, ADP, Absence Plus, EZ Claims, and Trizetto.
* Eliminate reliance on Excel Add-ins for payroll allocation and 837P file generation.
* Automate manual processes to improve efficiency and accuracy.
* Provide a scalable, secure, and user-friendly platform for financial management.

1. **Functional Requirements**
   1. Accounts Payable
      1. Automate invoice approval workflow
      2. Enable direct invoice upload from agencies without manual batch processing.
      3. Vendor Management:
         1. Maintain vendor records.
         2. Track credit card transactions and approvals.
         3. Generate invoices and attach supporting documentation.
      4. Integration with the general ledger for seamless financial tracking.
   2. Accounts Receivable and Billing
      1. Automate Billing Sheet Generation:
         1. Extract service logs from CINC.
         2. Generate 837P files without Excel add-ins.
         3. Load 837P files directly into EZ Claims.
      2. Claim Processing Integration:
         1. Synchronize claim status updates from external systems with the Cloud ERP system.
      3. Customer Management:
         1. Maintain customer records and track billing history.
         2. Generate customer statements and invoices.
         3. Provide tools for managing customer disputes and adjustments.
      4. Collections Management:
         1. Automate collection processes for overdue accounts.
         2. Provide reporting on aging receivables and collection efforts.
         3. Integrate with the general ledger for accurate financial tracking.
   3. Payroll Processing
      1. Automate payroll allocation, removing the need for Excel add-ins.
      2. Directly process ADP payroll file imports.
      3. Generate payroll distribution reports within the ERP system.
      4. Integrate with CINC to automate provider payroll processing.
   4. Financial Reporting
      1. Provide real-time financial dashboards for AP/AR, Payroll, Trial Balance and Revenue Tracking.
      2. Automate agency report generation, eliminating manual retrieval from CINC.
      3. Compare actuals vs. budgets/forecasts for financial analysis during Variance reporting.
      4. Enable detailed audit trails for compliance and tracking.
   5. General Ledger
      1. Maintain a centralized general ledger for all financial transactions.
      2. Support multi-fund accounting to meet State and Federal reporting requirements.
      3. Automate journal entries and reconciliation processes.
      4. Chart of Accounts:
         1. Provide a flexible and customizable chart of accounts.
         2. Support hierarchical account structures for detailed financial tracking.
      5. Financial Consolidation:
         1. Consolidate financial data from multiple entities or funds.
         2. Provide tools for intercompany eliminations and adjustments.
      6. Period-End Close:
         1. Automate period-end close processes, including accruals and adjustments.
         2. Provide reporting on period-end financial results.
   6. Grant Tracking
      1. Ability to track expenses, revenues, and compliance for each individual grant.
      2. Only specific transactions based on grant coding should be allowed.
      3. Grants must link to accounts payable and receivable modules for better financial tracking.
      4. Ability to track the rolling balance for each grant.
   7. Budgeting and Forecasting
      1. Provide tools for budget creation, tracking, and variance analysis.
      2. Support scenario planning and forecasting capabilities.
      3. Integrate budgeting with the general ledger for real-time updates.
      4. Automate workflows for budget approvals.
   8. Fixed Assets Management
      1. Track and manage fixed assets, including depreciation schedules.
      2. Integrate asset management with the general ledger.
      3. Provide reporting on asset values, maintenance schedules, and disposals.
   9. Procurement and Inventory Management
      1. Automate procurement processes, including purchase orders and approvals.
      2. Track inventory levels and automate reorder points.
      3. Integrate procurement and inventory data with the general ledger.
   10. Cash Management
       1. Bank Reconciliation:
          1. Automate bank reconciliation processes.
          2. Provide tools for matching transactions and identifying discrepancies.
       2. Cash Flow Forecasting:
          1. Provide tools for cash flow forecasting and analysis.
          2. Integrate with Accounts Payable and Accounts Receivable for accurate cash flow projections.
       3. Payment Processing:
          1. Support electronic payments, including ACH, wire transfers, and credit card payments.
          2. Provide tools for managing payment batches and approvals.
       4. Cash Position Reporting:
          1. Provide real-time reporting on cash positions and balances.
          2. Support multi-currency transactions and reporting.
2. **Technical Assessment of the Proposed ERP System**
   1. The State of Maine requires Bidders to demonstrate they have the appropriate security controls in place to protect the State’s sensitive and/or confidential information. Bidders are required to explain their compliance with the security requirements listed in the **Technical Assessment Form** attached in **Appendix D.**
3. **General/Technical Requirements**
   1. In addition to the Technical Assessment, Bidders are required to explain their compliance with the **General and Technical Requirements Form** listed in **Appendix E**.

1. **Project Management and Work Plan**

The Awarded Bidder will be required to utilize a formalized approach to project management which, at a minimum, will be compliant with the Project Management Institute (PMI) A Guide to the Project Management Body of Knowledge (PMBOK guide).

* 1. Project Methodology:The Awarded Bidder must structure and follow a project management approach for planning, organizing, and managing the staff and activities throughout the life of the project. The Awarded Bidder's project management approach must facilitate open and timely communication with the Department and a strong working relationship to achieve the overall goal of completed system design performance that meets or exceeds user needs on time and within budget.
  2. Project Manager: The Awarded Bidder will be required to assign an experienced Project Manager to the project. It is required that the Awarded Bidder’s Project Manager be knowledgeable with the Awarded Bidder’s proposed solution. It is preferred that the Awarded Bidder’s Project Manager be Project Management Professional (PMP) certified. The Awarded Bidder’s Project Manager will be responsible for the successful completion of all work tasks as defined within the project work plan and will work under the direction of the Department’s Project Manager. The Department reserves the right to require the Awarded Bidder to replace their Project Manager at any time during the course of the project.
  3. Change Management: The Awarded Bidder’s Project Manager will be required to formally document and track all changes to the functional design, technical design, and/or to approved deliverables. For each potential change, the Awarded Bidder’s Project Manager will work closely with the Department’s Project Manager to define and document the change, its benefits, and if necessary, its impact to the project schedule and budget. No work associated with a documented change will begin without first receiving written authorization from the Department’s Project Manager.
  4. Workplan: The Awarded Bidder’s Project Manager will be required to maintain a detailed project work plan, with content to be approved by the Department Project Manager, through the full term of the contract. The Awarded Bidder’s Project Manager will be required to submit an updated work plan to the Department’s Project Manager on a date and time that will be determined during contract negotiations. The work plan will be incorporated into the contract between the Department and the Awarded Bidder and will be made a part thereof.   
       
     The work plan will be created and maintained with an automated project management tool and will include appropriate detail to provide project status, dependencies and risk/mitigation. The project work plan will be updated and submitted to the Department’s Project Manager on a bi-weekly basis or at an alternative period of time that is formally specified and agreed to in writing by the Department’s Project Manager.

1. **Quality Assurance and Acceptance**

Project Quality Management ensures that the project satisfies the needs for which it was undertaken. The Awarded Bidder must develop a plan for the overall system and user acceptance testing.

* 1. Testing:Prior to moving the proposed system to the production environment, the Awarded Bidder will test all aspects of the solution in accordance with the Department’s [Deployment Certification Policy](https://www.maine.gov/oit/sites/maine.gov.oit/files/inline-files/ApplicationDeploymentCertification.pdf) for Major Application Projects. The Awarded Bidder must provide testing results prior to the State making a Go-No-Go decision to introduce system changes into its software production environment.
  2. Test Plan: The Awarded Bidder, in cooperation with the Department, will create a test plan including all tests required in accordance with providing and operating a fully certified system.
     1. The Awarded Bidder will describe its strategy for ensuring that new systems and all interfaces function properly when releasing new versions of any software application.
     2. The Awarded Bidder will indicate at what point in a new release the Department will receive access to new versions of software or applications.
     3. All components of the application must be tested in a non-production environment to ensure that the application test responses represent the exact behavior that will be expected of the application in the production environment.
  3. Test Execution:The Awarded Bidder will be responsible for scheduling and coordinating all testing activities to ensure that each of the tests are prepared for and performed in accordance with the test plan.
     1. The Awarded Bidder will train Department personnel as appropriate to participate in the testing effort.
     2. Unless specified otherwise within the test plan, the Awarded Bidder will be required to provide all tools, testing materials, and resources necessary to effectively perform the required tests.
     3. The Awarded Bidder is responsible for and must certify their system to be fully secure for all work provided under this procurement.
  4. Acceptance: System acceptance of the solution will occur following system implementation and Awarded Bidder’s demonstration that the system successfully provides all the functionality required by the Department; the system meets or exceeds the performance standards in the contract.

1. **User Training and Documentation**
   1. The Awarded Bidder will be responsible for providing training for Department staff and external users. Department staff shall need adequate training to configure, administer, operate, and update the selected solution.
   2. The Awarded Bidder must offer training to support the needs of both the Department and its user base. These trainings can be written, web-based, and/or instructor-led, (live and/or pre-recorded).
   3. The Awarded Bidder will develop and implement a training plan.
      1. The training plan must detail the strategy to develop, implement, and deliver training to Department identified individuals and identify the role-based modules, tailored materials, learning on-demand opportunities, and refresher trainings to meet the distinctive needs of each stakeholder group.
   4. Documentation must include:
      1. User Manuals & Quick Guides: Provide electronic copies of all user manuals, quick reference guides, and online help documentation. These documents should be updated to reflect the system at the time of go-live.
      2. Ongoing Support: Maintain an online knowledge base and integrated help desk support for continued user assistance.
      3. Preferred systems will also include tooltips and online help functionality to quickly and effectively help users troubleshoot various aspects of the system.
2. **Implementation**

The Awarded Bidder will be responsible for implementing the solution within the Production Environment. They will work with the Department to help transition users to the new system.

The Department will consider accepting the solution in major stages, as successfully tested. However, the final acceptance of the system will be based on overall end-to-end testing of the entire system. The Awarded Bidder will be responsible for all documents related to the scope of work described in this RFP.

* 1. Planning:The Awarded Bidder will be required to create an Implementation Plan, which will identify the approach that will be taken and the critical tasks that will be involved with implementing the solution. The Awarded Bidder will schedule and coordinate all implementation activities to ensure that the work is performed in accordance with the Implementation Plan.
  2. System Design and Analysis: System design and analysis activities must accomplish and meet all RFP requirements listed in this RFP. The Department desires methodologies that allow for multiple opportunities to validate and approve requirements and design.
  3. Resources: The Awarded Bidder will be required to provide all tools, equipment, materials, and resources necessary to effectively perform the required work tasks. Testing of the implemented solution will be conducted in accordance with the Deployment Certification Policy.
  4. Technical Documentation: The Awarded Bidder will be responsible for creating and providing the Department with all technical documents and related manuals, which will be reviewed and accepted prior to the implementation.

1. **Support and Maintenance**
   1. The Department requires the Awarded Bidder to provide post-implementation software maintenance and technology support for the system for both the Department and external end users.
   2. Awarded Bidder will produce and deliver an enhancement, operation, and maintenance plan that:
      1. Describes the steps and procedures in operating the system,
      2. Includes standard service-level agreements for system performance and issue resolution.
         1. The **Service Level Agreement (SLA)** in **Appendix H** includes provisions related to required levels of support. The Department will also consider options for additional levels of technical support.
         2. The Awarded Bidder shall be open to negotiation to ensure the SLA meet the Department’s needs.
      3. Describes change management process.
   3. The Awarded Bidder should describe their upgrade process and indicate what is included in the proposal. Any costs related to upgrades should appear only in the **Cost Proposal** in **Appendix F.**
   4. The Awarded Bidder will maintain, manage, and repair the system using a structured approach which ensures:
      1. Consistency, supportability, and stability of the system and is flexible enough to allow for rapid problem and issue resolution where required
      2. Coordination with the Department and OIT on all computer operating system upgrades, security patches, product licensing changes, as well as product releases containing Department approved enhancements and fixes; and
      3. Security patching is performed monthly.
   5. It is the Department’s expectation that the Awarded Bidder’s solution will be comprehensive and include all components required for the development, implementation, and maintenance of the solution.

**PART III KEY RFP EVENTS**

1. **Questions**
   1. **General Instructions:** It is the responsibility of all Bidders and other interested parties to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions.
      1. Bidders and other interested parties should use **Appendix G** (Submitted Questions Form) for submission of questions. If used, the form is to be submitted as a WORD document.
      2. Questions must be submitted, by e-mail, and received by the RFP Coordinator identified on the cover page of the RFP as soon as possible but no later than the date and time specified on the RFP cover page.
      3. The RFP Number and Title must be included in the subject line of the e-mail containing the submitted questions. The Department assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt.
   2. **Question & Answer Summary:** Responses to all questions will be compiled in writing and posted on the following website no later than seven (7) calendar days prior to the proposal due date: [Office of State Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain a copy of the Question & Answer Summary. Only those answers issued in writing on this website will be considered binding.
2. **Amendments**

All amendments released in regard to the RFP will also be posted on the following website: [Office of State Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain amendments. Only those amendments posted on this website are considered binding.

1. **Proposal Submission**
   1. **Proposals Due:** Proposals must be received no later than 11:59 p.m. local time, on the date listed on the cover page of the RFP.
      1. Any e-mails containing original proposal submissions or any additional or revised proposal files, received after the 11:59 p.m. deadline, will be rejected without exception.
   2. **Delivery Instructions:** E-mail proposal submissions must be submitted to the Office of State Procurement Services at [Proposals@maine.gov](mailto:Proposals@maine.gov).
      1. Only proposal submissions received by e-mail will be considered. The Department assumes no liability for assuring accurate/complete e-mail transmission and receipt.
         1. Proposal submission e-mails that are successfully received by the [proposals@maine.gov](mailto:proposals@maine.gov) inbox will receive an automatic reply stating as such.
      2. E-mails containing links to file sharing sites or online file repositories will not be accepted as submissions. Only e-mail proposal submissions that have the actual requested files attached will be accepted.
      3. Encrypted e-mails received which require opening attachments and logging into a proprietary system will not be accepted as submissions. Bidders should work with their Information Technology team to ensure that the proposal submission will not be encrypted due to any security settings.
      4. File size limits are 25MB per e-mail. Bidders may submit files separately across multiple e-mails, as necessary, due to file size concerns. All e-mails and files must be received by the due date and time listed above.
   3. **Submission Format:**
      1. Bidders are to insert the following into the subject line of their e-mail proposal submission: **“RFP# 202505077 Proposal Submission – [Bidder’s Name]”**
      2. Bidder’s proposal submissions are to be broken down into multiple files, with each file named as it is titled in bold below, and include:

* **File 1 [Bidder’s Name] – Preliminary Information:**

*PDF format preferred*

**Appendix A** (Proposal Cover Page)

**Appendix B** (Responsible Bidder Certification)

* **File 2 [Bidder’s Name] – Organization Qualifications and Experience:**

*PDF format preferred*

**Appendix C** (Organization Qualifications and Experience Form) and all required information and attachments stated in PART IV, Section II.

* **File 3 [Bidder’s Name] – Proposed Services:**

*PDF format preferred*

**Appendix D** (Technical Assessment Form)

**Appendix E** (General/Technical Requirements Form)

All required information and attachments stated in PART IV, Section III.

* **File 4 [Bidder’s Name] – Cost Proposal:**

*PDF format preferred*

**Appendix F** (Cost Proposal Form) and all required information and attachments stated in PART IV, Section IV.

**PART IV PROPOSAL SUBMISSION REQUIREMENTS**

This section contains instructions for Bidders to use in preparing their proposals. The Department seeks detailed yet succinct responses that demonstrate the Bidder’s qualifications, experience, and ability to perform the requirements specified throughout the RFP.

Bidders’ proposals must follow the outline used below, including the numbering, section, and sub-section headings. Failure to use the outline specified in PART IV, or failure to respond to all questions and instructions throughout the RFP, may result in the proposal being disqualified as non-responsive or receiving a reduced score. The Department, and its evaluation team, has sole discretion to determine whether a variance from the RFP specifications will result either in disqualification or reduction in scoring of a proposal. Rephrasing of the content provided in the RFP will, at best, be considered minimally responsive.

Bidders are not to provide additional attachments beyond those specified in the RFP for the purpose of extending their response. Additional materials not requested will not be considered part of the proposal and will not be evaluated. Bidders must include any forms provided in the submission package or reproduce those forms as closely as possible. All information must be presented in the same order and format as described in the RFP.

**Proposal Format and Contents**

**Section I Preliminary Information** (File #1)

* 1. **Proposal Cover Page**

Bidders must complete **Appendix A** (Proposal Cover Page). It is critical that the cover page show the specific information requested, including Bidder address(es) and other details listed. The Proposal Cover Page must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

* 1. **Responsible Bidder Certification**

Bidders must complete **Appendix B** (Responsible Bidder Certification). The Responsible Bidder Certification must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

**Section II Organization Qualifications and Experience** (File #2)

* 1. **Overview of the Organization**

Bidders must complete **Appendix C** (Qualifications and Experience Form) describing their qualifications and skills to provide the requested services in the RFP. Bidders must include three (3) examples of projects which demonstrate their experience and expertise in performing these services, as well as highlighting the Bidder’s stated qualifications and skills.

* 1. **Subcontractors**

If subcontractors are to be used, Bidders must provide a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors’ organizational capacity and qualifications.

* 1. **Organizational Chart**

Bidders must provide an organizational chart.  The organizational chart must include the project being proposed. Each position must be identified by position title and corresponding to the personnel job descriptions.

* 1. **Litigation**

Bidders must attach a list of all current litigation in which the Bidder is named and a list of all closed cases that have closed within the past five (5) years in which the Bidder paid the claimant either as part of a settlement or by decree.  For each, list the entity bringing suit, the complaint, the accusation, amount, and outcome.

* 1. **Financial Viability**

Bidders must provide a current copy of their Dun & Bradstreet Business Information Report Snapshot.

* 1. **Certificate of Insurance**

Bidders must provide a certificate of insurance on a standard ACORD form (or the equivalent) evidencing the Bidder’s general liability, professional liability and any other relevant liability insurance policies that might be associated with the proposed services.

**Section III Proposed Services** (File #3)

* 1. **Technical Assessment**

Bidders must complete **Appendix D** (Technical Assessment Form) to describe the Bidder’s capability to meet the stated requirements and policies identified in this RFP.

* 1. **Services to be Provided**

Bidders must discuss the Scope of Services referenced above in Part II of the RFP and what the Bidder will offer, including a description of the methods and resources the Bidder will use and how each task involved will be accomplished. Bidders must also describe how the expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, Bidders must clearly identify the work each will perform. This narrative should provide a concise description of the Bidder’s capabilities to produce aforementioned deliverables. The narrative should be no longer than twenty (20) pages total.

Bidders must complete **Appendix E** (General/Technical Requirements Form) to describe the Bidder’s capability to meet the stated requirements and policies identified in this RFP.

* 1. **Implementation - Work Plan**

Bidders must provide a realistic work plan for the implementation of the program through the first contract period. The work plan must be displayed in a timeline chart, and concisely describe each program development and implementation task, the month it will be carried out, and the person or position responsible for each task. If applicable, Bidders must identify all tasks to be delegated to subcontractors.

**Section IV Cost Proposal** (File #4)

* 1. **General Instructions**
     1. Bidders must submit a cost proposal that covers the period starting September 1, 2025, and ending on August 31, 2027. Renewal Periods are informational only and will not be factored into scoring.
     2. The cost proposal must include the costs necessary for the Bidder to fully comply with the contract terms, conditions, and RFP requirements.
     3. No costs related to the preparation of the proposal for the RFP, or to the negotiation of the contract with the Department, may be included in the proposal. Only costs to be incurred after the contract effective date that are specifically related to the implementation or operation of contracted services may be included.
  2. **Cost Proposal Form Instructions**

Bidders must fill out **Appendix F** (Cost Proposal Form), following the instructions detailed here and in the form. Failure to provide the requested information, and to follow the required cost proposal format provided, may result in disqualification or reduction in scoring of the cost proposal, at the discretion of the Department.

**PART V PROPOSAL EVALUATION AND SELECTION**

Evaluation of the submitted proposals will be accomplished as follows:

1. **Evaluation Process – General Information**
   1. An evaluation team, composed of qualified reviewers, will judge the merits of the proposals received in accordance with the criteria defined in the RFP.
   2. Officials responsible for making decisions on the award selection will ensure that the selection process accords equal opportunity and appropriate consideration to all who are capable of meeting the specifications. The goals of the evaluation process are to ensure fairness and objectivity in review of the proposals and to ensure that the contract is awarded to the Bidder whose proposal provides the best value to the State of Maine.
   3. The Department reserves the right to communicate and/or schedule interviews/presentations with Bidders, if needed, to obtain clarification of information contained in the proposals received. The Department may revise the scores assigned in the initial evaluation to reflect those communications and/or interviews/presentations.
   4. Changes to proposals, including updating or adding information, will not be permitted during any portion of the evaluation process. Therefore, Bidders must submit proposals that present their rates and other requested information as clearly and completely as possible.
2. **Scoring Weights and Process**
   1. **Scoring Weights:** Proposal scores will be based on a 100-point scale and will measure the degree to which each proposal meets the following criteria:

|  |  |  |
| --- | --- | --- |
| **Section I.** | **Preliminary Information**  Proposal materials to be evaluated in this section: all elements addressed in Part IV, Section I of the RFP. | **No Points** |
| **Section II.** | **Organization Qualifications and Experience** Proposal materials to be evaluated in this section: all elements addressed above in Part IV, Section II of the RFP. | **20 points** |
| **Section III.** | **Proposed Services**  Proposal materials to be evaluated in this section: all elements addressed above in Part IV, Section III of the RFP. | **50 points** |
| **Section IV.** | **Cost Proposal**  Proposal materials to be evaluated in this section:all elements addressed above in Part IV, Section IV of the RFP. | **30 points** |

* 1. **Scoring Process:** For proposals that demonstrate meeting the eligibility requirements in Section I, if applicable, the evaluation team will use a consensus approach to evaluate and score Sections II & III above. Members of the evaluation team will not score those sections individually but, instead, will arrive at a consensus as to assignment of points for each of those sections. Section IV, the Cost Proposal, will be scored as described below.
  2. **Scoring the Cost Proposal:** The total cost proposed for conducting all the functions specified in the RFP will be assigned a score according to a mathematical formula. The lowest bid will be awarded 30 points. Proposals with higher bid values will be awarded proportionately fewer points calculated in comparison with the lowest bid.

The scoring formula is:

(Lowest submitted cost proposal / Cost of proposal being scored) x 30 = pro-rated score

No Best and Final Offers: The State of Maine will not seek or accept a best and final offer (BAFO) from any Bidder in this procurement process.  All Bidders are expected to provide their best value pricing with the submission of their proposal.

* 1. **Demonstrations:** Following the evaluation of Sections I, II and III, the evaluation team, via the RFP Coordinator, will contact Bidders to request, at their own expense, a webinar demonstration and to arrange the details of the demonstration. Demonstrations will be limited to ninety (90) minutes and shall include a demonstration of the solutions functions outlined in Part II of the RFP and allow for the evaluation team to ask questions and receive answers. Demonstrations are anticipated to occur the week of August 4, 2025, between 8:00 a.m. and 4:00 p.m. EST.
  2. **Negotiations:** The Department reserves the right to negotiate with the awarded Bidder to finalize a contract. Such negotiations may not significantly vary the content, nature or requirements of the proposal or the Department’s Request for Proposal to an extent that may affect the price of goods or services requested. The Department reserves the right to terminate contract negotiations with an awarded Bidder who submits a proposed contract significantly different from the proposal they submitted in response to the advertised RFP. In the event that an acceptable contract cannot be negotiated with the highest ranked Bidder, the Department may withdraw its award and negotiate with the next-highest ranked Bidder, and so on, until an acceptable contract has been finalized. Alternatively, the Department may cancel the RFP, at its sole discretion.

1. **Selection and Award**
   1. The final decision regarding the award of the contract will be made by representatives of the Department subject to approval by the State Procurement Review Committee.
   2. Notification of conditional award selection or non-selection will be made in writing by the Department.
   3. Issuance of the RFP in no way constitutes a commitment by the State of Maine to award a contract, to pay costs incurred in the preparation of a response to the RFP, or to pay costs incurred in procuring or contracting for services, supplies, physical space, personnel or any other costs incurred by the Bidder.
   4. The Department reserves the right to reject any and all proposals or to make multiple awards.
2. **Appeal of Contract Awards**

Any person aggrieved by the award decision that results from the RFP may appeal the decision to the Director of the Bureau of General Services in the manner prescribed in [5 M.R.S.A. § 1825-E](http://www.mainelegislature.org/legis/statutes/5/title5sec1825-E.html) and [18-554 Code of Maine Rules Chapter 120](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-120).  The appeal must be in writing and filed with the Director of the Bureau of General Services, 9 State House Station, Augusta, Maine, 04333-0009 within 15 calendar days of receipt of notification of conditional contract award.

**PART VI CONTRACT ADMINISTRATION AND CONDITIONS**

1. **Contract Document**
   1. The awarded Bidder will be required to execute an [IT Service Contract (IT-SC) with Confidentiality and Non-Disclosure Agreement (NDA)](https://www.maine.gov/dafs/bbm/procurementservices/forms)including appropriate riders as determined by the issuing department. Bidders shall carefully review the IT-SC.

*All exceptions will be negotiated between the awarded Bidder(s) and the State. The State will not accept any proposed exceptions as part of this RFP process. The State is not obligated to accept, negotiate, or compromise of any proposed exceptions.*

The complete set of standard State of Maine Service Contract documents, along with other forms and contract documents commonly used by the State, may be found on the Office of State Procurement Services’ website at the following link: [Office of [State Procurement Services Forms Page](https://www.maine.gov/dafs/bbm/procurementservices/forms).](https://www.maine.gov/dafs/bbm/procurementservices/forms)

* 1. Allocation of funds is final upon successful negotiation and execution of the contract, subject to the review and approval of the State Procurement Review Committee. Contracts are not considered fully executed and valid until approved by the State Procurement Review Committee and funds are encumbered. No contract will be approved based on an RFP which has an effective date less than fourteen (14) calendar days after award notification to Bidders. (Referenced in the regulations of the Department of Administrative and Financial Services, [Chapter 110, § 3(B)(i)](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-110).)

This provision means that a contract cannot be effective until at least 14 calendar days after award notification.

* 1. The State recognizes that the actual contract effective date depends upon completion of the RFP process, date of formal award notification, length of contract negotiation, and preparation and approval by the State Procurement Review Committee. Any appeals to the Department’s award decision(s) may further postpone the actual contract effective date, depending upon the outcome. The contract effective date listed in the RFP may need to be adjusted, if necessary, to comply with mandated requirements.
  2. In providing services and performing under the contract, the awarded Bidder must act as an independent contractor and not as an agent of the State of Maine.

1. **Standard State Contract Provisions**
   1. Contract Administration

Following the award, a Contract Administrator from the Department will be appointed to assist with the development and administration of the contract and to act as administrator during the entire contract period. Department staff will be available after the award to consult with the awarded Bidder in the finalization of the contract.

* 1. Payments and Other Provisions

The State anticipates paying the Contractor on the basis of net 30 payment terms, upon the receipt of an accurate and acceptable invoice. An invoice will be considered accurate and acceptable if it contains a reference to the State of Maine contract number, contains correct pricing information relative to the contract, and provides any required supporting documents, as applicable, and any other specific and agreed-upon requirements listed within the contract that results from the RFP.

**PART VII LIST OF RFP APPENDICES AND RELATED DOCUMENTS**

**Appendix A** – Proposal Cover Page

**Appendix B** – Responsible Bidder Certification

**Appendix C** – Qualifications and Experience Form

**Appendix D** –Technical Assessment Form

**Appendix E** – General/Technical Requirements

**Appendix F** – Cost Proposal Form

**Appendix G** – Submitted Questions Form

**Appendix H** – Service Level Agreement (SLA)

**APPENDIX A**

**State of Maine**

**Department of Education**

*Child Development Services*

**PROPOSAL COVER PAGE**

**RFP# 202505077**

**ERP Accounting Software**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Bidder’s Organization Name:** | |  | | |
| **Chief Executive - Name/Title:** | |  | | |
| **Tel:** |  | | **E-mail:** |  |
| **Headquarters Street Address:** | |  | | |
| **Headquarters City/State/Zip:** | |  | | |
| *(Provide information requested below if* ***different*** *from above)* | | | | |
| **Lead Point of Contact for Proposal - Name/Title:** | |  | | |
| **Tel:** |  | | **E-mail:** |  |
| **Headquarters Street Address:** | |  | | |
| **Headquarters City/State/Zip:** | |  | | |

* This proposal and the pricing structure contained herein will remain firm for a period of 180 days from the date and time of the bid opening.
* No personnel currently employed by the Department or any other State agency participated, either directly or indirectly, in any activities relating to the preparation of the Bidder’s proposal.
* No attempt has been made, or will be made, by the Bidder to induce any other person or firm to submit or not to submit a proposal.
* The above-named organization is the legal entity entering into the resulting contract with the Department if they are awarded the contract.
* The undersigned is authorized to enter contractual obligations on behalf of the above-named organization.

*To the best of my knowledge, all information provided in the enclosed proposal, both programmatic and financial, is complete and accurate at the time of submission.*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX B**

**State of Maine**

**Department of Education**

*Child Development Services*

**RESPONSIBLE BIDDER CERTIFICATION**

**RFP# 202505077**

**ERP Accounting Software**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

*By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:*

1. *Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.*
2. *Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:*
   1. *Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or contract.*
   2. *Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.*
3. *Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification.*
4. *Have not within a three (3) year period preceding this proposal had one or more federal, state, or local government transactions terminated for cause or default*.
5. *Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above-mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.*
6. *Is not a foreign adversary business entity (*[*https://www.maine.gov/oit/prohibited-technologies*](https://www.maine.gov/oit/prohibited-technologies)*).*
7. *Is not on the list of prohibited companies (*[*https://www.maine.gov/oit/prohibited-technologies*](https://www.maine.gov/oit/prohibited-technologies)*) or does not obtain or purchase any information or communications technology or services included on the list of prohibited information and communications technology and services* [*https://www.maine.gov/oit/prohibited-technologies*](https://www.maine.gov/oit/prohibited-technologies) *(Title 5 §2030-B).*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX C**

**State of Maine**

**Department of Education**

*Child Development Services*

## QUALIFICATIONS and EXPERIENCE FORM

**RFP# 202505077**

**ERP Accounting Software**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

|  |
| --- |
| **Present a brief statement of qualifications. Describe the history of the Bidder’s organization, especially regarding skills pertinent to the specific work required by the RFP and any special or unique characteristics of the organization which would make it especially qualified to perform the required work activities. You may expand this form and use additional pages to provide this information.** |
|  |

|  |
| --- |
| **Provide a description of projects that occurred within the past five (5) years which reflect experience and expertise needed in performing the functions described in Part II – Scope of Services to be Provided of the RFP. Contract history with the State of Maine, whether positive or negative, may be considered in evaluating proposals even if not provided by the Bidder.**  *If the Bidder has not provided similar services, note this, and describe experience with projects that highlight the Bidder’s general capabilities.* |

|  |  |
| --- | --- |
| **Project One** | |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** | |
|  | |

|  |  |
| --- | --- |
| **Project Two** | |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** | |
|  | |

|  |  |
| --- | --- |
| **Project Three** | |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** | |
|  | |

**APPENDIX D**

**State of Maine**

**Department of Education**

*Child Development Services*

**TECHNICAL ASSESSMENT FORM**

**RFP# 202505077**

**ERP Accounting Software**

Bidders must complete the Technical Assessment Form embedded below.

The Technical Assessment Form may be obtained by double-clicking the Excel (.xlsx) icon below.

****

**APPENDIX E**

**State of Maine**

**Department of Education**

*Child Development Services*

**GENERAL/TECHNICAL REQUIREMENTS FORM**

**RFP# 202505077**

**ERP Accounting Software**

Bidders must complete the General/Technical Requirements Form embedded below.

The General/Technical Requirements Form may be obtained by double-clicking the Word (.docx) icon below.

****

**APPENDIX F**

**State of Maine**

**Department of Education**

*Child Development Services*

**COST PROPOSAL FORM**

**RFP# 202505077**

**ERP Accounting Software**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |
| **Proposed Cost:** | **$** |

Bidders must complete and submit budget forms providing a detailed breakdown of expenses in performing the services for the initial period of performance and subsequent renewals as described in this RFP and in the Bidder’s proposal. The total proposed cost amount is the proposed cost to be used in the scoring cost formula for evaluation purposes.

If portions of the proposed solution will be hosted on premise in the State Data Center, Bidders must utilize the [MaineIT FY2024-2025 Service Rates](https://www.maine.gov/oit/service-catalog/rates/FY2024-2025-service-rates) to determine the cost of hosting when completing **Appendix F** (Cost Proposal Form).

**The Budget Form may be obtained in an Excel (.xlsx) format by double clicking on the document icon below.** The document embedded below will not be accessible when viewing the RFP in a web browser – please download the RFP and view it in a desktop app to obtain access to the embedded document.

 **APPENDIX G**

**State of Maine**

**Department of Education**

*Child Development Services*

**SUBMITTED QUESTIONS FORM**

**RFP# 202505077**

**ERP Accounting Software**

This form should be used by Bidders when submitting written questions to the RFP Coordinator as defined in Part III of the RFP.

If a question is not related to any section of the RFP, enter “N/A” under the RFP Section & Page Number. Add additional rows as necessary.

|  |  |
| --- | --- |
| **Organization Name:** |  |

|  |  |
| --- | --- |
| **RFP Section & Page Number** | **Question** |
|  |  |
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**APPENDIX H**

**State of Maine**

**Department of Education**

*Child Development Services*

**SERVICE LEVEL AGREEMENT (SLA)**

**RFP# 202505077**

**ERP Accounting Software**

**State Administration Support**

The successful Bidder must provide ongoing assistance to the Agency in the oversight and upkeep of profiles, users, and program data. This support shall include, but not be limited to:

* + 1. Updating the ERP accounting software over time to synchronize with new program requirements of the State at no extra cost to the Department
    2. Resolving defects (deviation from expected behavior as stated in agreed upon requirements).
    3. Developing ongoing improvements to the system, such as data validations, that are determined by the Agency to be needed for effective oversight of the system.

**Help Desk Support**

The successful Bidder must provide a user-focused Help Desk, where system users can receive live technical support regarding system functionality. This Help Desk must become available immediately after receiving the Department’s official acceptance of the implemented solution.

**Hours of Operation**

The successful Bidder’s shall be available to provide technical support between the hours of 8:00 AM EST and 5:00 PM EST, Monday through Friday, excluding major holidays.

**Priority Levels and Response Time**

A priority scheme will be applied to all technical support requests sent to the successful Bidder according to the following criteria:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Priority** | **Impact** | **Definition** | **Response Time**  (During Hours of Operation) | **Resolution Time** |
| 1 | Critical | Affects multiple people significantly | 15 mins | Until Fixed |
| 2 | Serious | Affects a small number of people significantly | 1 hour | 8 hours |
| 3 | Important | Affects multiple people, but work can still be performed | 2 hours | 12 hours |
| 4 | Normal | Affects a small number of people, but work can still be performed | 4 hours | 24 hours |
| 5 | Other | Affects one person, but work can still be performed. | 8 hours | 24 hours |

**Outages and Planned Outages**

The number of planned outages (system availability) during the business week shall be limited to one (1) time per month. Planned maintenance to be done during the business week must take place after 5:00 PM EST and must receive prior written approval by the agency.

Maintain an availability metric of ninety-nine and a half percent (99.5%) of uptime in a calendar month, as measured by the number of actual hours available as a percentage of total hours.

**Hosting Environment**

The hosting environment will provide adequate capacity to ensure prompt response to both data inquiry/lookup and data modification transactions, at all times. Application performance metrics must meet a maximum 5 second response time when measured under an ethernet connection.

**Service Level Agreement (SLA) Review**

The approved SLA will be reviewed at a minimum of one time, beginning with the start of each fiscal year.