**STATE OF MAINE**

**Department of Health and Human Services**

*Office for Family Independence*



**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

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| --- | --- | --- | --- | --- | --- |
| **RFP Coordinator** | | | **NAME:** | | Stacy Martin |
| **TITLE:** | | Procurement Manager |
| **EMAIL:** | | [stacy.martin@maine.gov](mailto:stacy.martin@maine.gov?subject=RFP%20202406106%20Maine%20General%20Assistance%20Management%20Technology%20Platform) |
| *All communication regarding the RFP must be made through the RFP Coordinator.* | | | | | |
| **Submitted Questions Due Date** | | September 10, 2024, 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.* | | | | | | |
| **Proposal Submission Deadline** | **DATE:** | | | October 8, 2024, 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 Health and Human Services**

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

The State of Maine is seeking proposals for a technology platform to support the management of General Assistance benefits at both the State and Municipal levels.

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 October 8, 2024. 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** |
| --- | --- |
| **Applicant** | Individual who resides in the State and applies for General Assistance (GA) to their local Municipality. |
| **Automated Client Eligibility System (ACES)** | An application administered by the Department’s Office for Family Independence (OFI), used to determine an individual’s Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF) benefits. |
| **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 G** (Technical Assessment Form) for the Data Classification process (see also “PII Confidentiality Impact Level”). |
| **Department** | Maine Department of Health and Human Services |
| **Emergency** | Category for GA eligibility pursuant to homelessness, or any other life-threatening situation; or a situation beyond the control of the individual which, if not alleviated immediately, could reasonably be expected to pose a threat to the health or safety of a person; a situation which is imminent and which may result in homelessness, undue hardship, or unnecessary cost if not resolved immediately. |
| **GA Administrator** | An individual who oversees the administration of the GA program in a Municipality, township, or territory. |
| **General Assistance (GA)** | A specific amount and type of aid for individuals who are unable to provide the basic necessities required to maintain the health and safety of themselves or their families. GA may include assistance paying for:   * Household or personal supplies (toiletries, cleaning supplies) * Food * Housing (e.g., mortgage, rent, room rent, temporary housing) * Fuel & utilities * Medical, dental, prescriptions, medical supplies/equipment * Burial costs |
| [**MaineIT**](https://www.maine.gov/oit/) | Maine’s Office of Information Technology |
| **Municipality** | Local city/town government within the State which provide GA benefits to Maine residents. The State has approximately five hundred (500) Municipalities that administer GA benefits. |
| **OFI** | The Department’s Office for Family Independence |
| **Personally Identifiable Information (PII)** | Data 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:   * 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 * Any other information that is linked or linkable to an individual, such as medical, educational, financial, and employment information. |
| **PII Confidentiality Impact Level** | Includes low, moderate, or high levels and 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 G** (Technical Assessment Form). PII is evaluated to determine its Confidentiality impact levels, so appropriate safeguards can be applied to the PII. |
| **Regular** | All other GA benefits that do not fall into the Emergency category. |
| **RFP** | Request for Proposals |
| **SFY** | State Fiscal Year |
| **SNAP** | Supplemental Nutrition Assistance Program |
| **Software as a Service (SaaS)** | An application hosted by (i.e., served from) the awarded Bidder’s servers and accessed by users via the web. |
| **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. State Data includes any information:   * Concerning the State’s information technology infrastructure, systems and software, and procedures; and * Originating with the State in the course of using and configuring the services provided.   State Data 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. |
| **TANF** | Temporary Assistance for Needy Families |

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

**PART I INTRODUCTION**

1. **Purpose and Background**

The Department of Health and Human Services (Department) is seeking a technology platform for management of General Assistance (GA) benefits, as defined in this Request for Proposals document. 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.

The Department is dedicated to promoting health, safety, resiliency, and opportunity to all Maine Residents. The Department’s Office for Family Independence (OFI), manages assistance programs for Maine residents with low income, including cash assistance, supplemental food benefits, and medical assistance.

GA is a program administered in partnership between OFI and State Municipalities. In SFY2023, forty-two point nine million dollars ($42.9M) in total GA benefits were issued by Municipalities to Maine residents in need, which is an increase from twelve point seven million dollars ($12.7M) in SFY2019. Of the GA benefits issued in SFY2023, thirty million dollars ($30M) was reimbursed by the State to Municipalities to cover the cost. Due to data limitations and lack of a comprehensive State-wide database, the State does not have an accurate count of the total number of individuals receiving GA benefits in any given year or the related amounts.

In Maine, each Municipality is required to administer GA benefits to their local residents who apply for GA. The Municipality reviews the application and supporting documents in order to determine the Applicant’s eligibility. If the Applicant is determined eligible, the Municipality calculates a budget and determines the correct benefit amount and issues a voucher to the Applicant for the service. The Applicant may use the voucher as payment toward the service in which GA benefits were approved (such as housing, heating, electricity, food, etc.). The service provider is reimbursed by the Municipality and the Municipality is reimbursed by the Department for its proportion of the GA benefits administered.

Through this RFP, the Department is seeking to establish a database and management system for the administration of GA benefits. The Department anticipates the GA management platform will include two (2) development phases.

**Development Phase One** will digitize the process from Applicant eligibility determination onward and will include:

* Input of Applicant data (including household member data).
* GA budget and total GA benefits calculation.
* Input of actual voucher expenditures and electronic generation of vouchers.
* Electronic preparation and submission of voucher reimbursement invoices from Municipalities to OFI.
* Online review and approval of voucher reimbursement invoices by OFI.

Completion of Phase One would allow Municipalities to populate a database of all Applicants and voucher expenditures, which can then be searched by GA Administrators Statewide to determine benefits that an Applicant is currently or has previously received in any Municipality, including the information currently available in the “GA Portal” (from ACES).

**Development Phase Two** will digitize the GA application process and submission of the application to the Municipality and will include:

* An online, public-facing GA application, with online submission of GA applications (and supporting documentation) to the Municipality.
* Document management and document repository for all GA applications.
* A work queue for GA Administrators to receive and review GA applications and supporting documentation.
* Import of online GA application data, following GA Administrator review and approval, into the GA budget calculation and benefits determination process.

1. **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](http://www.mainelegislature.org/legis/statutes/1/title1sec401.html) et seq.).
   8. 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.
   9. 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.
2. **Eligibility to Submit a Bid**

All interested parties, who have an existing technology platform that has been implemented within the past five (5) years, as a benefits management solution, and is currently in production in the Continental United States, are invited to submit bids in response to this RFP.

The GA management solution must, at a minimum, include components previously proven to successfully deliver the following functionality:

1. Comprehensive database of Applicants and their households;
2. Web-based GA portal for Municipalities and the Department;
3. Web-based benefits look-up functionality;
4. Budget calculation tool; and
5. Reports and dashboards.
6. **Contract Term**

The Department is seeking cost-efficient proposals to provide services, as defined in the RFP, for this 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 two (2) 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, includes:   * Development Phase One (4/1/2025 – 3/31/2026) * Development Phase Two (4/1/2026 – 3/31/2027) * Ongoing maintenance and support | 4/1/2025 | 3/31/2027 |
| Renewal Period #1 | 4/1/2027 | 3/31/2031 |
| Renewal Period #2 | 4/1/2031 | 3/31/2035 |

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**

**Specific instructions for the Bidder to provide a narrative response to the Scope of Services may be found in Part IV, Section III, Services to be Provided.**

1. **General Assistance (GA) Management Technology Platform**
2. **Development Phase One** - Provide a hosted, isolated technology environment capable of performing core functions of a GA Management Technology Platform, which includes:
   1. Web-Based GA Administrator Portal, establishment of a secure user authentication/authorization administered from a remote system (e.g., using secure web services) for Municipalities, with an anticipated volume of Municipal portal users totaling approximately five hundred (500) to one thousand (1000).
   2. Ability to maintain and update data pertaining to the Municipality, including, but not limited to:
      1. Location of GA office and hours of operations;
      2. Point(s) of contact and contact information for Emergency GA assistance requests;
      3. Municipal maximums;
      4. City/town GA ordinance.
   3. Data portal for establishment of a comprehensive database of Applicants, including, but not limited to:
      1. Personal information for each Applicant;
         1. Solution shall restrict users from inputting duplicate Applicants;
      2. Contact information;
      3. Employment information;
      4. Household member composition and information;
      5. Case notes.
   4. Establishment of a GA calculator to determine the amount and categories of GA assistance to be administered based on information provided on the application, including, but not limited to:
      1. Input of:
         1. Categories and amounts of assistance requested;
         2. Use of income for the previous thirty (30) days, including income, household receipts, and other receipts;
         3. Projected thirty (30) day income for the Applicant, family, and others in the household;
         4. Total asset types and amounts of the Applicant, family, and household members;
         5. Total monthly household expenses;
         6. Other expenses attributable to the household.
      2. Output of:
         1. Household income deficit, which determines GA eligibility approval and category;
         2. Household income surplus, which determines GA eligibility denial for Regular GA benefits;
         3. Unmet need, which determines GA eligibility approval for Emergency benefits and category.
   5. Ability for GA Administrators to input, review, and/or approve GA based on the GA calculator including, but not limited to:
      1. Approvals, whether Regular or Emergency;
      2. Denials, and rationale;
      3. Total amount of benefits issued;
      4. Total amount of benefits by category;
      5. Timeframe of benefits;
      6. Generation of approval/denial letter;
      7. Generation of voucher; and
      8. Case notes.
   6. Ability to input actual voucher expenditures associated with a GA approval, including, but not limited to:
      1. Total amount expended;
      2. Category of expenditure; and
      3. Case Notes.
   7. Ability to electronically create and submit an electronic Municipal invoice summary from the Municipality to the Department’s Office for Family Independence (OFI), including, but not limited to:
      1. Ability to electronically prepare a monthly invoice for each Municipality for reimbursement from OFI, based on data logged on voucher expenditures in the previous month, which include, at a minimum:
         1. Total GA spend by month and by category;
         2. Amount reimbursable to Municipality from OFI, minus amounts directly reimbursed to the Municipality by the Applicant or other sources;
         3. Unique counts of categories of GA reimbursement, by number and dollar amount;
         4. Workfare requirements and value, per each GA Applicant.
      2. Electronic attestation, signing, and submission of monthly invoice from Municipality to OFI; and
      3. Ability for OFI to receive invoices submitted electronically by Municipalities for review, approval, and preparation for manual submission to OFI’s payment processing system.
   8. A web-based benefits search/look-up function:
      1. For GA Administrators to determine if the Applicant:
         1. Is currently receiving, or previously received, GA benefits in any Municipality within the State, and if so, what benefits they received.
         2. Is currently receiving SNAP or TANF, and if so, what type and amount of benefits they are receiving:
            1. The proposed technology platform will be required to connect to the Department’s Automated Client Eligibility System (ACES).
         3. Has been approved or denied for GA benefits in any Municipality.
      2. With specific Applicant identifiers, including but not limited to, first name, last name, social security number, date of birth, OFI unique identifier(s).
   9. Reporting and dashboard functionality:
      1. Dashboards shall include, but not be limited to:
         1. Current GA recipients, broken down by Municipality and benefit category, including “Regular” and “Emergency”;
         2. Previous GA recipients, broken down by date of issuance, timeframe of benefits, Municipality, and benefit category;
         3. Approvals and denials of GA benefits;
         4. Individuals under Statewide one hundred twenty (120) day disqualification with Municipality, disqualification dates, and reason for disqualification; and
         5. GA recipients in repayment status, broken down by Municipality, reason for repayment status, date of issuance, date of repayment agreement, total repayment amount, and amount paid.
      2. Reports shall include, but not be limited to:
         1. Monthly GA benefits administered, by total Applicants, benefit category, Municipality, and total spending;
         2. Monthly GA approvals and denials;
         3. Monthly invoice(s) from each Municipality, including:
            1. All invoices from a single Municipality;
            2. All invoices from all Municipalities, listed alphabetically by Municipality;
            3. One (1) or more invoices in a time period selected from a single Municipality; and
            4. One (1) or more invoices in a time period for all Municipalities, listed alphabetically by Municipality;
      3. All data elements and reports shall be exportable by the Department to an importable format such as .csv, xlsx., etc.
   10. A comprehensive database of Applicants for Department use, which includes:
       1. Secure user authentication/authorization administered from a remote system (e.g., using secure web services) for OFI and other State staff;
       2. Applicant profiles, including:
          1. Personal information for each Applicant;
          2. Contact information;
          3. Employment information;
          4. Household member composition;
          5. Total GA benefits received, including Regular and Emergency; and
          6. Case notes.
3. **Development Phase Two** – Provide a public-facing online application for GA benefit submissions and reviews, with the ability for:
   1. Applicant to access and submit application via a desktop, tablet, and/or mobile device;
   2. Applicants to upload and manage supporting application documents;
   3. Applicants to select their Municipality for submission;
   4. The application and supporting documents to be directed to the Applicant’s Municipality and be viewable in the GA Administrator’s portal; and
      1. Include a work queue for GA Administrators to receive, review, and act upon submission of online electronic GA application submissions.
   5. Online applications to be translated into multiple languages.
4. **Additional Technical Requirements, Training, and Support**
5. Utilize a three (3) phased approach for the construction of the GA Management Technology Platform, specifically:
   1. Phase 1 - Design, Development, and Implementation (DDI);
   2. Phase 2 - Transition towards operation as a GA management platform; and
   3. Phase 3 - Autonomous, ongoing maintenance and operations as a GA management platform.
6. Ensure the GA Management Technology Platform:
   1. Is modularly designed with self-contained set of functionalities;
   2. Accounts for role-based access and functionality, including, but not limited to:

Municipal GA Administrators; and

OFI staff.

* + 1. Accommodates a paper process for Municipalities that do not have adequate technology support.
    2. Is fully compliant with the Americans with Disabilities Act (ADA) and is accessible to users with disabilities, has screen reader technology, and other accessibility supports.
    3. Is subject to audit to ensure program integrity and prevent fraud, waste, and abuse, including an audit trail of key data elements.

1. Provide training and operational change management support to the Department and Municipalities, including, but not limited to:
   * 1. Online trainings;
     2. Creation of user manuals and other guidance documents;
     3. On-site trainings (as needed and directed by OFI); and
     4. Other training and resources required by Municipalities to use the system.
2. Provide ongoing maintenance, and operational and helpdesk support for the solution through the life of the contract, ensuring there is no or minimal operational and technological cost or burden on Municipalities to use and maintain the system.
3. Provide efficient and cost-effective process for cloud-based data storage.
   * 1. Ensure the Department and Municipalities have real-time or close to real-time access to all data.
4. Develop, maintain, and provide the Department and/or MaineIT upon request, a complete set of technical design documents, including technical systems specification which:
   * 1. Describes the system requirements, system objects, programs, screens, business rules, interfaces, services, and reports;
     2. Describes application programming, interfaces, and includes a preliminary design wireframe;
     3. Ensures the requirements and logical description of the entities, relationships, and attributes of the data are defined and allocated into system and data design specifications; and
     4. Includes a change management process to provide a means to track and control requirements change.
5. **Technical and Security Requirements**
6. Comply with all MaineIT [Policies & Standards](https://www.maine.gov/oit/policies/) (Privacy & Security, Web & Network, Accessibility, Lifecycle Management, Incident Planning & Response, Governance, Business) including additional Privacy and Security compliance with other federal government requirements specifically including the Social Security Administration’s Technical System Security Requirements (TSSR) Version 10.6 Rev. November 14, 2023 based on [NIST 800.53 Rev. 5](https://csrc.nist.gov/pubs/sp/800/53/r5/upd1/final) Security and Privacy Controls for Information Systems and Organizations, ensuring special attention is paid to:
7. [General Architecture Principles](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fgeneral-architecture-principles_1.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336396623%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=A%2FF33EDQhGjSHL17w7KiMGxJm4a%2FDp3Cda5FzQdR4VU%3D&reserved=0);
8. [System and Services Acquisition Policy and Procedures (SA-1)](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fsystem-services-acquisition-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336396623%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=ctG1NriTCr583VeCddNadeCmmiiCjCOfWyJW98Isynw%3D&reserved=0);
9. [Application Deployment Certification Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fapplication-deployment-certification_0.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336396623%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=i0Qw%2BQa9EsT66qPqls5Ku0tQf%2BQ3%2F7pg31BgEByZ1pA%3D&reserved=0);
10. [Digital Accessibility and Usability Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fdigital-accessibility-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336396623%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=TinoDjn%2FZ%2BGxVPkphHmTCPXF%2F5iM4zlY6uUgHw0GTU0%3D&reserved=0);
11. [Remote Hosting Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fremote-hosting-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336396623%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=6FrMpQYaPk9sPHCZzbzAF%2B98JNyptS5EPu2xcsuzI28%3D&reserved=0);
12. [Data Exchange Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fdata-exchange-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=HhCWu%2B8%2BBYXd77kzFMXEjVJSfJfGbBRwfW5agpWjndg%3D&reserved=0);
13. [Information Security Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Finformation-security-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=GrAqzbPyyr3wQgKC2EE04q32Y%2F2PWxZvB4d1vkgtjwM%3D&reserved=0);
14. [Access Control Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Faccess-control-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=H66lLkOoTo%2BBuOAqSEYkViIKUbXh1HMMDNBMqpirwRU%3D&reserved=0);
15. [Access Control Procedures for Users](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Faccess-control-procedures-for-users.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=nTLSXzLSZHRWIavNBqMLrTVPY9vehvdd8V8q6aGNazM%3D&reserved=0);
16. [Risk Assessment Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Frisk-assessment-policy-procedure.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=1LxUodJE7HkyIzKSM9n0bB7%2F9yHuEQT4yqOuxSfdYiY%3D&reserved=0);
17. [Vulnerability Scanning Procedure](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fvulnerablity-scanning-procedure.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=6R5X2brJyaqLP6Abx1XoYPEyeJwtCvv8vPzkJ5p0EzE%3D&reserved=0);
18. [Security Assessment and Authorization Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2FSecurityAssessmentAuthorizationPolicy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=jLXyhJppTOAV9WoHmhMdGqioKR1xY08vVxC6tf7ahLI%3D&reserved=0);
19. [System and Information Integrity Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fsystem-information-integrity-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=esdEu4wwWAGZ0QyYpH9Y%2B7lkkN25LvllWzngrKWK3M0%3D&reserved=0);
20. [Configuration Management Policy](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.maine.gov%2Foit%2Fsites%2Fmaine.gov.oit%2Ffiles%2Finline-files%2Fconfiguration-management-policy.pdf&data=05%7C01%7CPeter.Lewis%40maine.gov%7C8104b55761da4095e87108db352f7f9b%7C413fa8ab207d4b629bcdea1a8f2f864e%7C0%7C0%7C638162250336552895%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=SonYJqdCUwld6BbX9CPhf9VelEDHjtlamZgAVpbl3gM%3D&reserved=0); and
21. [Business Continuity and Disaster Recovery Policy](https://www.maine.gov/oit/sites/maine.gov.oit/files/inline-files/BusinessContinuityDisasterRecoveryPolicy.pdf).
22. Ensure the proposed solution achieves the [NIST 800-53 Rev 5](https://csrc.nist.gov/publications/detail/sp/800-53/rev-5/final) for the remaining security and privacy control families to a security baseline appropriate to the impact level of the data as determined by the Department, including:
23. Physical and Environmental Protection;
24. Awareness and Training;
25. Planning;
26. Audit and Accountability;
27. Assessment, Authorization, and Monitoring;
28. Personnel Security;
29. PII Processing and Transparency;
30. Contingency Planning;
31. Identification and Authentication;
32. Incident Response;
33. System and Communications Protection;
34. Maintenance;
35. Media Protection; and
36. Supply Chain Risk Management to a security baseline appropriate to the impact level of the data as determined by the agency.
37. Work with MaineIT to submit required information to the Department in compliance with MaineIT policies.
38. Any configuration and/or customization of the baseline platform must comply with relevant State and Federal security policies and compliance mandates.
39. Any remotely hosted solutions must comply with FEDRAMP Moderate or High certification.
40. Comply with the Health Insurance and Portability Accountability Act of 1996 (HIPAA) and the [Health Information Technology for Economic and Clinical Health Act (HITECH)](https://www.hhs.gov/hipaa/for-professionals/special-topics/hitech-act-enforcement-interim-final-rule/index.html).
41. Store all data within the Continental U.S.
42. All data shall remain the property of the Department throughout the contract term(s) and shall be provided to the Department at the end of the resulting contract, or when requested, at no additional cost. In addition, at the end of the resulting contract, the awarded Bidder shall have no rights or ability to retain or use the Department data.
43. Ensure there will be no ability to view or access the Department’s confidential data from any location outside of the Continental U.S.
44. Ensure all data is isolated from other State’s/customer’s assets.
45. Conduct a full SSAE-18 SOC 2 Type 2 Annual Audit, which includes testing the Five (5) Trust Services Criteria (Security, Availability, Processing Integrity, Confidentiality and Privacy).
    1. Provide a copy of the audit and plan of action for remediation of any deficiencies to the Department and/or MaineIT.
46. Sign a MaineIT Non-Disclosure Agreement, as requested and required by MaineIT.
47. Provide Backup, Recovery, and Disaster Recovery Services by:
    1. Developing a Disaster Recovery plan that addresses the disaster needs of the Department as it relates to the implementation and ongoing operations of GA platform;
    2. Implementing a system failover process to ensure minimum downtime based on the RPO/RTO, caused by either scheduled maintenance, unpredicted system, or component failure;
    3. Conducting an annual Disaster Recovery test and provide the results of this test to the Department and MaineIT annually.
    4. Ensuring the capability to restore data completely to its status at the time of the last backup; with a minimum required recovery point objective of twenty-four (24) hours (i.e., maximum data loss cannot exceed twenty-four (24) hours).
    5. Ensuring a recovery time objective of twenty-four (24) hours (i.e., maximum time to recover the system cannot exceed twenty-four (24) hours).
48. Maintain a technical architecture diagram and narrative and provide to the Department and/or MaineIT upon request.
    1. Ensure the narrative text describes the proposed software’s technical architecture and summarizes its technical capabilities and strategic benefits, as well as any technical limitations or strategic shortcomings, including at a minimum:
       * 1. System design and functional capabilities;
         2. Security model including authentication, authorization, data protection, auditing, and physical and network infrastructure;
         3. Data model; and
         4. Technical assumptions.
49. **Document Repository Requirements**
50. Manage all documents within a designated document repository (network folder or online repository such as Microsoft SharePoint).
    1. The format, structure, and location of the document repository shall be mutually agreed upon by the Department, MaineIT, and awarded Bidder.
    2. Ensure the repository is available to the State without requiring any incremental per user cost.
       1. Ensure the environment complies with applicable MaineIT Policies, Standards, and Procedures, including but not limited to:

Remote Hosting; and

Security.

* + 1. Updates shall be installed and applied to the Documents Repository.
    2. The Department and MaineIT shall be granted access to the files at any point during and upon request;
    3. An electronic copy of the repository shall be provided to the Department and MaineIT prior to the termination of the contract resulting from this RFP.
    4. The format, delivery frequency, and transfer mechanisms shall be identified and mutually agreed-upon between the Department, MaineIT, and awarded Bidder.

1. The proposed document repository must be approved by the Department prior to execution.
2. **Operations and Maintenance Requirements**
3. Provide a Software as a Service (SaaS) technical solution and system support model, that includes:
4. Operations support both before and after Go-Live.
   * 1. Ensure operational support activities comply with the MaineIT Policies, Standards, and Procedures.
5. Producing and delivering an operations and maintenance plan that describes the steps and procedures in operating the system, standard service-level agreements for system performance and issue resolution, and the change management process, including, but not be limited to:
   1. Maintaining an availability metric of ninety-nine-point five percent (99.9%) of uptime in a calendar month, as measured by the number of actual hours available as a percentage of total hours in the month.
   2. Providing the Department and MaineIT at least thirty (30) days advance written-notice of any planned material change in network operations or architecture.
6. Ensuring any planned material change in network operations or architecture cannot be made without the prior written-consent of the Department and MaineIT.
7. Hosting the solution in a Service-Oriented Architecture that is scalable, load-balanced, and redundant:
8. Specify baseline metrics that will be provided to the Department; and
9. Monitor the hosting environment for a real-time view and alerting of the solution system’s health.
10. Maintaining an up-to-date security and overall posture of the system with routine, scheduled upgrades that address vulnerabilities and through continuous security and capacity management processes which identify and address issues before they materialize by:
11. Developing a security plan that will conform to all applicable State and federal law, rules, regulations, and requirements, including HIPAA requirements;
12. Providing assertion of an ability to meet the MaineIT Security requirements.
    * 1. Monthly vulnerability scanning of infrastructure and application shall be made available to the Department and MaineIT.
      2. Remediation plan for any findings approved by the Department and MaineIT must be provided within ten (10) business days.
13. Providing a third-party hosting infrastructure and application vulnerability and compliance assessment, to the Department and MaineIT, annually.
14. Ensuring appropriate mechanisms are in place to safeguard security of automated data processing resources, software, data, data exchange between various parties, telecommunications, and personnel for the development and operation of the GA solution; and
15. Ensuring the security plan is reviewed and approved in writing by the appropriate federal agencies, State agencies and MaineIT before being placed into operation.

**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 must use **Appendix K** (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. 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.
      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. **Delivery Instructions:**
      1. Bidders are to insert the following into the subject line of their e-mail proposal submission: **“RFP# 202406106 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)

**Appendix C** (Eligibility to Submit a Bid)

All required eligibility documentation stated in PART IV, Section I.

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

*PDF format preferred*

**Appendix D** (Organization Qualifications and Experience Form)

**Appendix E** (Subcontractor Form)

**Appendix F** (Litigation Form)

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

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

*PDF format preferred*

**Appendix G** (Technical Assessment Form)

**Appendix H** (Response to Proposed Services)

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

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

*Excel format preferred*

**Appendix I** (Cost Proposal) 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.

Bidder 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.

* 1. **Eligibility Requirements**

Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes:

1. **Appendix C** (Eligibility to Submit a Bid)

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

* 1. **Overview of the Organization**

Bidders must complete **Appendix D** (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 within the last five (5) years, which demonstrate their experience and expertise in performing these services, as well as highlighting the Bidder’s stated qualifications and skills.

* 1. **Subcontractor**

If subcontractors are to be used, including consultants, Bidders must complete **Appendix E** (Subcontractor Form) providing 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 enterprise-wide organization chart showing officers, major organization components, and the project team proposed to meet the requirements of this RFP. This chart must indicate to whom the project team reports. Note: individual project team positions are to be identified in the job description and staffing plan requirements of **Appendix H** (Response to Proposed Services).

* 1. **Litigation**

Bidders must complete **Appendix F** (Litigation Form) providing 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. If no litigation has occurred, write “none” on **Appendix F** (Litigation Form)

* 1. **Financial Viability**

Bidders must provide the three (3) most recent years of Financial Statements audited or reviewed by a Certified Public Accountant.

* 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.

The awarded Bidders certificate of insurance shall include applicable liability to support compliance of the Department’s IT Service Contract (IT-SC).

|  |  |
| --- | --- |
| **Required Attachments Related to Organization Qualifications and Experience** | |
| **Attachment #:** | **Attachment Name:** |
| One (1) | Qualifications and Experience Form |
| Two (2) | Subcontractor Form |
| Three (3) | Organizational Chart |
| Four (4) | Litigation |
| Five (5) | Financial Viability |
| Six (6) | Certificate of Insurance |

Attachments 1 – 6 must be included in numerical order, as part of File 2, as outlined in PART III “Submitting the Proposal” of this RFP. Attachments 1 – 6 will be reviewed and evaluated by the Department’s evaluation team under the Organization Qualifications and Experience section of this RFP.

**Section III Technical Assessment and Proposed Services** (File #3)

1. Bidders must complete **Appendix G** (Technical Assessment Form) describing the Bidder’s capability to meet the stated requirements and policies identified in this RFP.
2. Bidders must complete **Appendix H** (Response to Proposed Services Form) by providing a detailed response to the requirements outlined in this RFP.

|  |  |
| --- | --- |
| **Required Attachments Related to Proposed Services** | |
| **Attachment #:** | **Attachment Name:** |
| Seven (7) | Technical Architecture Diagrams |
| Eight (8) | Technical Architecture Narrative |
| Nine (9) | Job Descriptions |
| Ten (10) | Staffing Plan |
| Eleven (11) | Implementation - Work Plan |

Attachments 7 – 11 must be included in numerical order, as part of File 3, as outlined in PART III “Submitting the Proposal” of this RFP. Attachments 7 – 11 will be reviewed and evaluated by the Department’s evaluation team under the Proposed Services section of this RFP.

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

* 1. **General Instructions**
     1. Bidders must submit a cost proposal that covers the period, starting 4/1/2025 and ending on 3/31/2035.
     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 I** (Cost Proposal), 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 and 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 interview/presentation process and, 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 – Eligibility Requirements** |
| **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. | **30 points** |
| **Section III.** | **Technical Assessment and Proposed Services**  Proposal materials to be evaluated in this section: all elements addressed above in Part IV, Section III of the RFP. | **35 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. | **35 points** |

* 1. **Scoring Process:** The evaluation and scoring of proposals will be conducted using a staged approach.  Proposals will be required to meet or exceed the stated minimum scoring requirements of the stage in which the proposal is being evaluated to move onto the next stage of evaluation.  Any proposal not meeting the stated minimum scoring requirements of a stage will be ineligible for award consideration and, at that point, be removed from the evaluation process.

**Stage One - Eligibility:** Proposals must meet the requirements of Part I.C. “Eligibility to Submit a Bid.”  The Bidder must complete **Appendix C** (Eligibility to Submit a Bid). Proposals which do not include **Appendix C** or do not meet Part I.C. “Eligibility to Submit a Bid” requirements will be ineligible for award consideration.  Proposals meeting the eligibility requirements will move on to Stage Two of the evaluation and scoring process.

**Stage Two – Organization Qualifications and Experience:** Proposals meeting the eligibility requirements in Stage One will move on to be evaluated for Part IV, Section II “Organization Qualifications and Experience” and will be scored by the evaluation team using the consensus approach. Members of the evaluation team will not score this section individually but, instead, arrive at a consensus as to assignment of points for this section.  Proposals will be able to earn up to a maximum of **30** points for this section with the minimum score of **18** being required for a proposal to move onto Stage Three.

**Stage Three – Technical Assessment and Proposed Services:** Proposals with a score of **18** or higher in Stage Two will move on to be evaluated for Part IV, Section III “Technical Assessment and Proposed Services” and will be scored by the evaluation team using the consensus approach.  Members of the evaluation team will not score this section individually but, instead, arrive at a consensus as to assignment of points for this section.  Proposals will be able to earn up to a maximum of **35** points for this section with the minimum score of **21** being required for a proposal to move onto Stage Four.

**Stage Four - Demonstrations:** Proposals with a score of **21** or higher in Stage Three will move on to provide a demonstration to the evaluation team. The RFP Coordinator will contact Bidders who meet the minimum scoring requirement in Stages Two and Three 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 will include a demonstration of the solutions functions outlined in Part II of the RFP and allow the evaluation team to ask questions and receive answers. Demonstrations are expected to take place during the week of December 2, 2024, between 8:00 a.m. and 4:00 p.m. EST.

Members of the evaluation team will arrive at a consensus regarding the degree to which the proposed solution meets the requirements of this RFP. Based on this consensus, the post-demonstration scores may be adjusted (upward or downward) based on the demonstrations and according to the scoring weights described in Part V.B. of the RFP. Proposals that maintain the minimum score of **21** points outlined in Stage Three, will move onto Stage Five.

**Stage Five - Cost Proposal:** Proposals with a score of **21** or higher in Stage Three and maintaining at least that score following Stage Four will move on to be evaluated for PART IV, Section IV “Cost Proposal.” The total cost proposed for conducting all the functions specified in this RFP will be assigned a score according to a mathematical formula. The lowest bid will be awarded **35** points. Proposals with higher bid values will be awarded fewer points calculated in comparison with the lowest bid.

The scoring formula is:

(Lowest submitted cost proposal / Cost of proposal being scored) x **35** = 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. **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 a State of Maine [IT Service Contract (IT-SC)](https://www.maine.gov/dafs/bbm/procurementservices/sites/maine.gov.dafs.bbm.procurementservices/files/inline-files/IT%20Service%20Contract%20%28IT-SC%29%20Template_1.12.24_0.pdf" \o "IT Service Contract (IT-SC) ) with appropriate riders as determined by the issuing department. Bidders shall carefully review the IT-SC. The IT-SC includes **Appendix J** Confidentiality and Non-Disclosure Agreement.

*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 with 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 Forms](https://www.maine.gov/dafs/bbm/procurementservices/forms) webpage.

Forms and contract documents commonly used by the Department can be found on the Department’s [Division of Contract Management website](https://www.maine.gov/dhhs/about/financial-management/contract-management).

* 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** – Eligibility to Submit a Bid

**Appendix D** – Qualifications and Experience Form

**Appendix E** – Subcontractor Form

**Appendix F** – Litigation Form

**Appendix G** –Technical Assessment Form

**Appendix H** – Response to Proposed Services

**Appendix I** – Cost Proposal

**Appendix J** – Confidentiality and Non-Disclosure Agreement

**Appendix K** – Submitted Questions Form

**APPENDIX A**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

**PROPOSAL COVER PAGE**

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Bidder’s Organization Name:** | |  | | | | |
| **Vendor Customer Code**  (for current State of Maine vendors)**:** | | | | | VC | |
| **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:** | |  |
| **Street Address:** | |  | | | | |
| **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 Health and Human Services**

*Office for Family Independence*

**RESPONSIBLE BIDDER CERTIFICATION**

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

|  |  |
| --- | --- |
| **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 Health and Human Services**

*Office for Family Independence*

## ELIGIBILITY TO SUBMIT A BID FORM

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

|  |  |  |
| --- | --- | --- |
| **Bidder’s Organization Name:** |  | |
| **Eligibility Certification** | | |
| All interested parties, who have an existing technology platform that has been implemented within the past five (5) years, as a benefits management solution, and is currently in production in the Continental United States, are invited to submit bids in response to this RFP.  The GA management solution must, at a minimum, include components previously proven to successfully deliver the following functionality:   * + Comprehensive database of Applicants and their households;   + Web-based GA portal for Municipalities and the Department;   + Web-based benefits look-up functionality;   + Budget calculation tool; and   + Reports and dashboards. | | |
| 1. Is the proposed solution an existing technology platform that has been implemented within the past five (5) years, as a benefits management solution?   Provide a detailed description of how the solution meets this requirement: | | ☐ Yes or  No |
|  | | |
| 1. Is the proposed solution currently in production in the Continental United States?   Provide a detailed description of how the solution meets this requirement: | | ☐ Yes or  No |
|  | | |
| 1. Does the proposed solution, at a minimum, include components previously proven to successfully deliver the following functionality:  * Comprehensive database of Applicants and their households; * Web-based GA portal for Municipalities and the Department; * Web-based benefits look-up functionality; * Budget calculation tool; and * Reports and dashboards.   Provide a detailed description of how the solution meets this requirement: | | ☐ Yes or  No |
|  | | |
| 1. Identify which project(s) meet the eligibility requirements outlined in Part I.C. of this RFP and as described in the Bidder’s response to **Appendix D,** if applicable? | | Project One  Project Two  Project Three |

**APPENDIX D**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

## QUALIFICATIONS and EXPERIENCE FORM

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

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

|  |
| --- |
| **Instructions: Respond to the following statements regarding the Bidder qualifications and experience with a benefits management solution. Expand this form and use additional pages to provide this information, as needed.** |

|  |
| --- |
| 1. **Briefly describe the history of the Bidder’s organization, especially regarding skills pertinent to the specific services required by the RFP and any special or unique characteristics of the organization which would make it especially qualified to perform the required services.** |
|  |
| 1. **Identify which states, within the Continental United States, the Bidder has implemented a benefits eligibility solution.** |
|  |

|  |  |
| --- | --- |
| 1. **Project Descriptions** | |
| **Project One** | |
| **Business Reference Name:** |  |
| **Reference Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Go-live Date:** |  |
| **Solution Name and Versions:** | **At Go-Live:**  **Currently in Use:** |
| **Description of Project** | |
| 1. **State which of the required components identified in Part I, C. and Appendix C of the RFP are/were included in this project. Identify which components were developed by the Bidder. If some components were developed by another organization, identify that organization, and describe the legal relationship (if any) between the Bidder and the other organization(s).** | |
|  | |
| 1. **Were product updates/releases installed or deployed after the initial go-live for the Bidder’s benefits management solution? Identify the functionality for each major release and describe the deployment process.** | |
|  | |
| 1. **Describe any additional aspects of this project which are pertinent to the specific services required by the RFP.** | |
|  | |

|  |  |
| --- | --- |
| **Project Two** | |
| **Business Reference Name:** |  |
| **Reference Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Go-live Date:** |  |
| **Solution Name and Versions:** | **At Go-Live:**  **Currently in Use:** |
| **Description of Project** | |
| 1. **State which of the required components identified in Part I, C. and Appendix C of the RFP are/were included in this project. Identify which components were developed by the Bidder. If some components were developed by another organization, identify that organization, and describe the legal relationship (if any) between the Bidder and the other organization(s).** | |
|  | |
| 1. **Were product updates/releases installed or deployed after the initial go-live for the Bidder’s benefits eligibility solution? Identify the functionality for each major release and describe the deployment process.** | |
|  | |
| 1. **Describe any additional aspects of this project which are pertinent to the specific services required by the RFP.** | |
|  | |

|  |  |
| --- | --- |
| **Project Three** | |
| **Business Reference Name:** |  |
| **Reference Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Go-live Date:** |  |
| **Solution Name and Versions:** | **At Go-Live:**  **Currently in Use:** |
| **Description of Project** | |
| 1. **State which of the required components identified in Part I, C. and Appendix C of the RFP are/were included in this project. Identify which components were developed by the Bidder. If some components were developed by another organization, identify that organization, and describe the legal relationship (if any) between the Bidder and the other organization(s).** | |
|  | |
| 1. **Were product updates/releases installed or deployed after the initial go-live for the Bidder’s benefits management solution? Identify the functionality for each major release and describe the deployment process.** | |
|  | |
| 1. **Describe any additional aspects of this project which are pertinent to the specific services required by the RFP.** | |
|  | |

**APPENDIX E**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

## SUBCONTRACTOR FORM

**RFP# 202460106**

**Maine General Assistance Management Technology Platform**

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

|  |
| --- |
| **If subcontractors, including consultants, are to be used, provide each individual subcontractor’s business or consultant’s name, contact person, address, phone number, and a brief description of the subcontractor’s organizational or consultant’s capacity and qualifications. Bidders may add additional Subcontractors/Consultants as needed.** |

|  |  |
| --- | --- |
| **Subcontractor/Consultant** | |
| **Subcontractor Business or Consultant’s Name:** |  |
| **Contact Person:** |  |
| **Address:** |  |
| **Phone Number:** |  |
| **E-Mail:** |  |
| **Subcontractor/consultant organizational capacity and qualifications** | |
|  | |

|  |  |
| --- | --- |
| **Subcontractor/Consultant** | |
| **Subcontractor Business or Consultant’s Name:** |  |
| **Contact Person:** |  |
| **Address:** |  |
| **Phone Number:** |  |
| **E-Mail:** |  |
| **Subcontractor/consultant organizational capacity and qualifications** | |
|  | |

**APPENDIX F**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

## LITIGATION FORM

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

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

|  |
| --- |
| **Provide 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. If no litigation has occurred, write “none.”** |

|  |  |
| --- | --- |
|  | |
| **Case #** |  |
| **Entity Filing Suit:** |  |
| **Complaint/Accusation:** |  |
| **Amount:** |  |
| **Outcome** |  |
|  | |
| **Case #** |  |
| **Entity Filing Suit:** |  |
| **Complaint/Accusation:** |  |
| **Amount:** |  |
| **Outcome** |  |
|  | |
| **Case #** |  |
| **Entity Filing Suit:** |  |
| **Complaint/Accusation:** |  |
| **Amount:** |  |
| **Outcome** |  |

**APPENDIX G**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

**TECHNICAL ASSESSMENT FORM**

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

**Bidder must complete the Technical Assessment Form. The Technical Assessment Form can be obtained by double-clicking the Excel (.xlsx) icon below**.

****

**APPENDIX H**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

## RESPONSE TO PROPOSED SERVICES

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

**The response to proposed services form may be obtained in a Word (.docx) format by double clicking on the document icon below.**

****

**APPENDIX I**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

**COST PROPOSAL**

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

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

Bidders must submit a cost proposal that includes the cost necessary for the Bidder to fully comply with the contract terms, conditions, and RFP requirements. The total cost summary amount will be used to score the cost proposal as defined in Part V, B. of the RFP.

**The Budget Form may be obtained in an Excel (.xlsx) format by double clicking on the document icon below.**



**APPENDIX J**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

**CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT**

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

**The Confidentiality and Non-Disclosure Agreement may be obtained in a Word (.docx) format by double clicking on the document icon below.**

****

**APPENDIX K**

**State of Maine**

**Department of Health and Human Services**

*Office for Family Independence*

**SUBMITTED QUESTIONS FORM**

**RFP# 202406106**

**Maine General Assistance Management Technology Platform**

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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