



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE &
FINANCIAL SERVICES**

**Janet T. Mills
Governor**

**Kirsten LC Figueroa
Commissioner**

February 14, 2025

Danielle Pittman, Direct – FIDM Solutions Group
Informatix, Inc.
235 Capitol Oaks Dr., Suite340
Sacramento, CA 95833

**SUBJECT: Notice of Conditional Contract Award under RFP # 202409177,
Financial Institution Data Match Services**

Dear Ms. Pittman:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative & Financial Services Services for Financial Institution Data Match Services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder subject to submission of and vetting of the comprehensive system security plan during contract:

- Informatix, Inc.

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

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

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

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

Sincerely,

Leslie Flores

Leslie Flores
Deputy Director
Maine Revenue Service, Compliance Division

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Office of State Procurement Services [formerly the Division of Purchases], Chapter 120, § (2) (2).

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409177
RFP TITLE: FINANCIAL INSTITUTION DATA MATCH SERVICES
BIDDER: Informatix Inc.
DATE: January 29, 2025

SUMMARY PAGE

Department Name: Department of Administrative and Financial Services
Name of RFP : Financial Institution Data Match Services
Names of Evaluators: Michael Fortin, Cynthia Ouellette, Scott Armington, Matthew Backus, Mark Gilbert, and Leslie Flores

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> • N/A 		
The bidder has submitted their proposal in the required format including the appendices.		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	N/A	N/A
Section III. Proposed Services	N/A	N/A
Section IV. Cost Proposal	N/A	N/A
<u>Total Points</u>	<u>100</u>	

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**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information Proposal materials to be evaluated in this section: all elements addressed in Part IV, Section I of the RFP

Evaluation Team Comments:

The proposal cover page was submitted as required and signed by the president of the company.

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	N/A	N/A

Evaluation Team Comments:

I. Proposal materials to be evaluated in this section: all elements addressed in Part IV, Section II of the RFP.

1. Overview of Organization- Bidders must complete Appendix C

Informatix has provided FIDM services to MRS for the last 14 years and to DHHS for the last 23 years. They provide FIDM services for 60 state agencies. They have been in business for 37 years. Informatix has been providing FIDM Services to state agencies since 1999. They are the largest FIDM vendor in the country. They listed 3 projects: Wisconsin Department of Revenue, Indiana Department of Revenue, New Jersey Division of Taxation. Team has combined experience of 100 years.

2. Subcontractors

They will not be using subcontractors.

3. Organizational Chart

The org chart provided lists all positions that are required for the services with names attached to the FIDM Director, Manager, and Deputy project manager. The chart was very detailed.

4. Litigation

None in the last 5 years

5. Certificate of Insurance

A Certificate of Insurance was provided listing Commercial General liability insurance of \$1M

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**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	N/A	N/A

Evaluation Team Comments:

Proposal materials to be evaluated in this section: all elements addressed in Part IV, Section III of the RFP.

1. Technical Assessment- Appendix D was completed

- Data Compliance
- @MaineIT
- Information Security Standards
- Cloud Service Provider Reqs
- NIST Requirements

This was reviewed and the results were that Informatix has provisionally met the Technical Assessment, subject to submission of and vetting of the comprehensive system security plan during contract.

2. Services to be Provided- Bidders must discuss the Scope of Services referenced in Part II of the RFP

Data Match Requirements

- *Establish and maintain an inventory of financial institutions doing business in Maine including trust companies, savings banks, industrial banks, commercial banks, savings and loan associations, and federal and state credit unions*

Informatix has established and maintains agreements with 90 Maine Financial (FI) Institutions on behalf of Maine Revenue Services (MRS), which is a 100% participation rate. Since 1999, Informatix has been providing outreach to financial institutions.

-

Contact each financial institution and establish the data connections and file requirements necessary to perform accurate FIDM in a way that meets the requirements of the law and the operational needs of MRS and the financial institution. A wide range of file formats and media will be included and must be accommodated. Ensure files can be processed on any media used by the participating financial institutions.

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Since Informatix already performs the MRS FIDM program; file requirements and transfer methods have already been established with the FIs. They are presently performing the financial matches. They identify and with the state's approval contact the FIs to ensure participation.

- ***Keep all information obtained from MRS and the financial institutions confidential***
To keep all information confidential, Informatix maintains rigorous corporate standards regarding the security of information in our project offices. These standards include stringent network security controls, physical building and data center access, as well as up-front control during our hiring process. Following policies and procedures are in place and reviewed regularly to ensure our security standards are kept up to date with federal and state regulations:
 - Disengagement Plan v5
 - DMS Vulnerability Management Policy v 1.3
 - Security Breach Procedure
 - FIDM Business Continuity/Disaster Recovery Plan v7
 - FIDM Policy and Procedures Manual v7
 - FIDM Change Management Procedures v1
 - Informatix Employment Screening Policy v1r3
 - FIDM Privacy INFX
 - INFX Visitor Sign-IN, Sign-Out Procedure

- ***Work with MaineIT staff to establish the data connections and file format necessary*** Currently, Informatix downloads debtor files weekly from MRS. In the current process, Informatix uses Filezilla to FTP into the state's secure site, and retrieves the debtor file each week. The load is in the Inquiry Format as defined in the Financial Institution Data Match Specifications. All connections comply with current IRS FIPS guidelines.
- ***Perform the data match function with all participating financial institutions on a quarterly basis.*** Informatix has been providing FIDM services to MRS since 2010. In the most recent quarter, they located over \$690 Million in assets overall for all agencies through our matching process. Informatix' FIDM processing is performed in our FIDM Operations Center in Lansing, Michigan
- ***Establish with MRS a mutually agreed-upon schedule for the electronic transmission of files.*** Currently Informatix retrieves debtor files from the MRS secure server each week on Monday. Response files containing matches are uploaded weekly on Thursday to MRS
- ***Resolve any technical difficulties that impact the ability of financial institutions' ability to participate***
Informatix will continue using the data connections already established for the MRS FIDM program, ensuring no interruption in services.

- ***Notify MRS via email, immediately upon becoming aware of a financial institution's non-compliance*** Currently they have a 100% compliance rate for Maine's FIDM program

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IT System and File Requirements

- Informatix delivers files via the following secure file transfer protocols (SFTP or FTPS); All data is encrypted at rest and in transit, including data stored in the FIDM database.

Alternative methods of file transfer will be evaluated and must be approved by MaineIT. If the current process needs to change over the course of the contract, Informatix understands that alternative methods of file transfer will be evaluated and must first be approved by MaineIT.

- *Make technological changes in order to meet upgrades to industry supported standards.* Informatix consistently reviews industry standards such as file format changes and security changes to Publication 1075 and NIST 800-53 to maintain the most current solution
- *File Processing: Record layout and file specifications should be in accordance with the Financial Institution Data Match Specifications Handbook found at: [Multistate Financial Institution Data Match Specifications Handbook | The Administration for Children and Families \(hhs.gov\)](#)* The Debtor File Record Layout in use for Maine Revenue Services is in accordance with the Financial Institution Data Match Specifications Handbook (latest edition). Informatix provided a file format layout
- *IT Staff: Adequate information technology staff must be assigned to complete implementation and to maintain the system during the life of the awarded contract. IT staff must be capable of communicating and coordinating resolution of any issues that may occur, correcting any problems, and implementing any changes within two (2) business days unless otherwise agreed in writing.* Many of the same IT staff have been working with MRS since 2010 including project director, project manager, deputy project manager, lead specialist, specialist, developers, technical manager, Systems architect, LAN administrator, business analyst
- *Implement a Department-approved change control process.* Upon contract execution, Informatix will make our Change Control Process policy available for MRS upon request.

System Enhancement Services: After the system is operational, MRS may require additional programming and user acceptance testing in the event of changes in policies, guidelines, rules, regulations, statutes or judicial interpretations.

<https://www.maine.gov/oit/policies-standards> Informatix has put in place the following procedures to ensure that all system modifications and hardware updates implemented into the production environment are reliable, accurate and maintain the integrity of the system.

The purpose of our Software Development Lifecycle and Infrastructure Update Management Procedure documents is to define the documentation, communication, and processes required to control the integrity of the FIDM production environment To ensure integrity, reliability and

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security of the information resources within the Informatix FIDM environment, changes to the systems should be properly authorized before they are moved into production

Technical requirements

Informatix has reviewed and agrees to comply with the State IT Policies

3. Implementation – Work Plan

Informatix currently operates the MRS FIDM program. This means that there will be no implementation period

They did show they could put together a detailed work plan.

Confidentiality and Security Clearance Requirements

Informatix complies with IRS Publication 1075, including the building security guidelines.

FTI Building Security Guidelines has also been reviewed and Informatix complies with those standards. Informatix' operation center facility is secured with key card access and has camera monitoring recording 24/7 within the operations space. Work areas are separated by locked doors where FTI may be located

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**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	x	Cost Proposal Being Scored	x	Score Weight	=	Score
	x		x	N/A points	=	N/A

Evaluation Team Comments:

The bidder is the only bidder that submitted a proposal. There are no development costs due to the fact they are currently providing this service to MRS. There would be no implementation costs.

**STATE OF MAINE
INDIVIDUAL TECHNICAL ASSESSMENT NOTES**

RFP #: 202409177

RFP TITLE: DAFS-MRS Financial Institution Data Match Services

BIDDER NAME: Informatix

DATE: 28 Jan 2025

EVALUATOR NAMES: B. Victor Chakravarty, Scott Armington, Ben Haschalk

EVALUATOR DEPARTMENT: DAFS-OIT

Provisionally Met Technical Assessment, Subject to submission of and vetting of the comprehensive system security plan during contract.
Data Compliance
NIST 800-171: <i>Adequate Response. Weak Evidence.</i>
Maine FOAA: <i>Adequate Response. Weak Evidence.</i>
Maine Breach Notification Law: <i>Adequate Response. Weak Evidence.</i>
NIST 800-53: Rev5: <i>Adequate Response. Weak Evidence.</i>
Privacy Act of 1974: <i>Adequate Response. Weak Evidence.</i>
U.S. DHHS-OCSE: <i>Adequate Response. Weak Evidence.</i>
IRS 1075: <i>Quality of Response? Adequate Response. Weak Evidence.</i>
IRS 1075 Contractor Addendum: <i>Adequate Response. Weak Evidence.</i>
MaineIT
H1: N/A
H2: N/A
H3: <i>Adequate Response. Weak Evidence. Mentioned AWS SOC2, but that only covers the Infrastructure, NOT the Informatix App.</i>
A1: N/A
A2: N/A
A3: N/A
A4: <i>Adequate Response. Adequate Evidence.</i>
Information Security Standards
S1: <i>Adequate Response. Weak Evidence.</i>
S2: <i>Adequate Response. Adequate Evidence.</i>
S3: <i>Adequate Response. Weak Evidence.</i>
S4: <i>Adequate Response. Adequate Evidence.</i>
S5: <i>Adequate Response. Adequate Evidence. Credible SBOM.</i>
Cloud Service Provider Reqs
CSP1: <i>Adequate Response. Weak Evidence.</i>
CSP2: <i>Adequate Response. Weak Evidence.</i>
CSP3: <i>Adequate Response. Adequate Evidence.</i>
CSP4: <i>Adequate Response. Adequate Evidence. (Maine is not using the GUI)</i>
CSP5: <i>Adequate Response. Adequate Evidence.</i>
CSP6: <i>Adequate Response. Adequate Evidence.</i>
CSP7: <i>Adequate Response. Adequate Evidence.</i>
CSP8: <i>Adequate Response. Adequate Evidence.</i>
CSP9: <i>Adequate Response. Adequate Evidence.</i>
CSP10: <i>Adequate Response. Weak Evidence.</i>
CSP11: <i>Adequate Response. Adequate Evidence.</i>

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BIDDER NAME: Informatix

DATE: 28 Jan 2025

EVALUATOR NAMES: B. Victor Chakravarty, Scott Armington, Ben Haschalk

EVALUATOR DEPARTMENT: DAFS-OIT

CSP12: <i>Adequate Response. Adequate Evidence.</i>
CSP13: <i>Adequate Response. Adequate Evidence.</i>
CSP14: <i>Adequate Response. Adequate Evidence.</i>
NIST Reqs
N1: <i>Adequate Response. Adequate Evidence.</i>
N2: <i>Adequate Response. Adequate Evidence.</i>
N3: <i>Adequate Response. Weak Evidence.</i>
N4: <i>Adequate Response. Weak Evidence. Mentioned SOC 1 Type 2.</i>
N5: <i>Adequate Response. Weak Evidence.</i>
N6: <i>Adequate Response. Adequate Evidence.</i>
N7: <i>Adequate Response. Adequate Evidence.</i>
N8: <i>Adequate Response. Weak Evidence.</i>
N9: <i>Adequate Response. Weak Evidence.</i>
N10: <i>Adequate Response. Adequate Evidence.</i>
N11: <i>Adequate Response. Adequate Evidence.</i>
N12: <i>Adequate Response. Adequate Evidence.</i>
N13: <i>Adequate Response. Weak Evidence.</i>
N14: N/A



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AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409177
RFP TITLE: Financial Institution Data Match Services

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

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

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

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

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

Leslie Flores
Signature

1/15/2025
Date



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

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2/3/2025

Signature

Date



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**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409177
RFP TITLE: Financial Institution Data Match Services**

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

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

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Cynthia Ouellette
Signature

January 15, 2025
Date



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Janet T. Mills
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AGREEMENT AND DISCLOSURE STATEMENT
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I, Scott Armington accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Scott Armington

Signature

January 15, 2025

Date



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I, (print name at right) Matthew Backus
accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of **Administrative and Financial Services**. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Matthew Backus

January 16, 2025

Signature

Date



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

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I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

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

A handwritten signature in black ink that reads "B. Victor Chakravarty".

Signature

17 Jan 2025
Date



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES**

**Janet T. Mills
Governor**

**Kirsten LC Figueroa
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409177
RFP TITLE: Financial Institution Data Match Services**

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

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

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

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

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

Signed by:

Ben Haschalk

B14CDE596CB3447...
Signature

02/11/2025

Date