



Request for Proposal

RFP # 22-078

Request for Proposals for a Child Welfare Case Management System

Wake County, North Carolina
Wake County Finance Dept. - Procurement Services
Wake County Justice Center, 2nd Floor – Suite 2900
301 S. McDowell Street
Raleigh, NC 27601

Proposals are due September 15, 2022 before 3:00 PM EST.

Table of Contents

1	Introduction	
1.1	Introduction	4
1.2	Project Overview	4
1.3	Scope of Services	5
1.4	General Proposal Requirements	5
2	General Submission Requirements	
2.1	Proposal Contact	6
2.2	Proposal Submittal Requirements	6
2.3	Proposer Expenses	7
2.4	Interpretations, Discrepancies and Omissions	7
2.5	Pre-Proposal Questions	7
2.6	Finalists and Interviews	7
2.7	Tentative Schedule	7
2.8	Award	8
2.9	Non-Disclosure of County Information	8
2.10	Retention of Proposer Material	8
3	General Terms and Conditions	
3.1	Certification	8
3.2	Conflict of Interest	8
3.3	Assignment	8
3.4	Indemnification	9
3.5	Independent Contractor	9
3.6	Payment	9
3.7	Insurance	9
3.8	Governing Law	11
3.9	Confidential Information/Public Records Law	11
3.10	Compliance with Laws and Regulations	11

3.11	Acceptance	11
3.12	Additional Services	11
3.13	Audits	11
3.14	E-Verify	12
3.15	Iran Divestment Act	12
3.16	Federal Uniform Guidance	12
3.17	Anti-Discrimination	12
4	Current Environment	
4.1	Wake County Government	13
4.2	Current Policy Management Processes	13
5	Detailed Submission Requirements	
5.1	Proposal Format	13
6	Evaluation Criteria	
6.1	Selection Participants	16
6.2	Evaluation of Proposals	16

1 Introduction

1.1 Introduction

Wake County, North Carolina (“The County”) is seeking proposals from a qualified firm to provide a software solution that delivers full case management of Health and Human Services Child Welfare client information that is compliant with United States (“Federal”), North Carolina (“The State”), and County policy. Case management solutions must include full-service client lifecycles from client intake, assessment, and service delivery to necessary auditing and reporting. Case management solutions must be able to connect and interact with existing County, State, and 3rd party applications that facilitate the Child Welfare service delivery process.

1.2 Project Overview

Wake County Government is in Raleigh, North Carolina. We serve a population of over one million. Our Child Welfare division is part of Wake County Health & Human Services with over 300 staff and serving more than 20,000 Children and Families annually. Wake County Child Welfare is looking for a Case Management solution that will provide efficient and effective case management.

Specifically, the Wake County Child Welfare Division is looking for an end-to-end solution that will provide the appropriate:

- Case level management for one or more children within the same case
- Workflows (Routing, Notifications, Escalations) – refer to Appendix A and B
- Integration with Enterprise Document Management Systems
- Integration with ERP solutions for payment information submittal and staffing
- Integration with GIS solutions for service delivery optimization
- Integration with Vital Records systems
- Integration with other Health & Human Service departments
- Customizable APIs for import and export case information and documents
- Communications (electronic, paper, API with other systems)
- Security that meets federal, state and local compliance (e.g. HIPAA, FERPA, 42CFR, NCGS122C)
- Single Sign-On capabilities (e.g. SAML, LDAP)
- Reporting
- Integrate with or export to data visualization software
- Dashboard/Snapshot of cases in the system, key performance indicators, individual staff dashboards, and To-Do lists
- Complete data access for future extensibility and data import/export with other systems (municipalities, county, state, federal)
- Accessibility for staff in the field
- Mobile device UI/UX functionality and accessibility
- Microsoft operating system environment preferred

To assist responders with the development of their proposal, the appendices attached have been created:

Attachment A Technical Requirements

Attachment B Child Welfare Unit Summary

Attachment C Child Welfare Business Workflow

The County will entertain both responses that provide a turnkey software as a service (SaaS) solution with full platform hosting provided by the vendor or responses for an on-premises solution. Determination of the hosting environment will be evaluated based on the proposed solution and its ability to integrate into the current County environment.

1.3 Scope of Services

It is expected that the Vendor will be able to provide a comprehensive set of services including but not limited to:

- 1.3.1 Business Requirements, Analysis, and Planning:** Provide business analysis and project management to collect application specific requirements, define, sequence, and estimate duration of activities, identify risks, and plan communications management with identified stakeholders.
- 1.3.2 Implementation:** Provide individualized support to system administrators during the initial setup of the software, including setup of customizable features and settings, creation of groups and roles, and integrations with other systems.
- 1.3.3 Integration with Other Systems:** Integration with industry standard Identity Providers and enterprise applications currently used in Child Welfare.
- 1.3.4 End-User Training and Documentation:** Provide the guidance needed to utilize all system features, including development and management training resources for document authors, reviewers, and approvers, as well as training resources for searching and viewing documents in the online repository.
- 1.3.5 Ancillary Services and Support:** Includes the services necessary and/or recommended for the successful implementation and upkeep, including but not limited to additional training and ongoing technical support.

1.4 General Proposal Requirements

When responding to this RFP, please follow all instructions carefully. Submit proposal contents according to the outline specified and submit documents according to the instructions. Failure to follow these instructions will be considered a non-responsive proposal and may result in immediate elimination from further consideration.

By submitting a proposal, Proposers acknowledge that:

- 1.4.1** The County reserves the right to reject any or all proposals if it determines that select proposals are not responsive to the RFP. The County reserves the right to reconsider any proposal submitted at any phase of the procurement. It also reserves the right to meet with select Proposers at any time to gather additional information.
- 1.4.2** Proposals will be received by Wake County Government at the time noted on the cover page of this document. At that point, Wake County will close the receipt of proposals and begin the evaluation process. The only information that will be released will be the names of the respondent(s). No other information will be disclosed, except as required by the evaluation process, until a contract is awarded.
- 1.4.3** Wake County, solely at its option, may disclose the name(s) of any firms or companies being considered or elevated during the process. Proposers are not to contact any county staff or



elected officials about the process due to the nature of a competitive environment and to protect the integrity of the RFP process. As information becomes available and is relevant for release, that information will be shared with respondents.

2 General Submission Requirements

2.1 Proposal Contact

This RFP and any subsequent action taken as a result thereof is issued by the Wake County Procurement Services in accordance with North Carolina General Statutes on behalf of the County. Proposal responses should be directed to Procurement Services, specifically to the Purchasing Director, as outlined below. In regard to this RFP and subsequent procurement process, vendors shall make NO CONTACTS, either written or verbal, with any Wake County employee, staff member, or Board of Commissioner members during the period beginning with the issuance of this document through approval of award unless authorized by the proposal contact. Any attempt by a Proposer to contact or influence a member or members of the aforementioned will result in the immediate disqualification of the Proposer from award for items or services on this RFP.

Proposal Contact:

Melissa England
Wake County Finance Dept - Procurement Services
Melissa.England@wakegov.com
919-856-6327

2.2 Proposal Submittal Requirements

Proposers are required to prepare their proposals in accordance with the instructions outlined in this part and elsewhere in this RFP. Each Proposer is required to submit its proposal in a sealed package.

Three (3) copies shall be submitted to the address shown below as well as an electronic version on USB Drive.

Mailing Address:

Melissa England
Wake County Finance Dept - Procurement Services
Wake County Justice Center, 2nd Floor – Ste 2900
301 S. McDowell Street, Raleigh, NC 27601

The County must receive proposals no later than 3:00 PM EST on September 15, 2022. The Proposer's name, RFP number, and proposal closing time and date must be marked clearly on the proposal submission. The time of receipt shall be determined by the time clock in the Wake County Procurement Services office. The County will not be held responsible for the failure of any mail or delivery service to deliver a proposal response prior to the stated proposal due date and time. It is solely the Proposer's responsibility to: (1) Ascertain that they have all required and necessary information, documents, and addenda, prior to submitting a response; (2) Ensure that the response is received at the correct location and time. Late responses, regardless of delivery means, will not be accepted. Fax or email responses will not be accepted.

2.3 Proposer Expenses

The County will not be responsible for any expenses incurred by any Proposer in the development of a response to this Request for Proposal or any other activities associated with this procurement including but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to Wake County and/or its representatives. Further, the County shall reserve the right to cancel the work described herein prior to issuance and acceptance of any contractual agreement/purchase order by the recommended Proposer even if the Board of Commissioners has formally accepted a recommendation.

2.4 Interpretations, Discrepancies and Omissions

Should any Proposer find discrepancies, omissions or ambiguities in this RFP, the Proposer must at once request in writing an interpretation from proposal contact listed in Section 2.1. The deadline for submitting questions is August 23, 2022, by 5:00 PM EST. All questions will be answered to the extent possible in the form of addenda to the specifications. The addenda will be available within seven calendar days following the question deadline. All written requests for clarification should be addressed to the attention of Melissa England.

Failure to request an interpretation will be considered evidence that the Proposer understands the provision of the RFP.

The issuance of a written addendum is the only official method by which interpretation, clarification or additional information will be given by the County. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarification will be without legal effect. It is the County's intent not to issue any addenda after August 31, 2022.

2.5 Pre-Proposal Questions

The County will also make a good faith effort to provide other data or attachments, if the request will further clarify the project's scope. All requests for further information shall be received by the County by August 23, 2022, before 5:00 PM EST. A copy of all answers and further clarifications provided by the County to those making inquiries will be posted as an addendum to the RFP on the County's website by August 31, 2022.

2.6 Finalists and Interviews

From the proposals received, County staff will identify a short-list of finalists. The finalists may be expected to make a presentation to and respond to questions. Additional information regarding the content of the presentation will be provided to the selected finalists.

2.7 Tentative Schedule

Date	Event
August 10, 2022	RFP Release
August 23, 2022, by 5pm	County must receive notice of questions, discrepancies, omissions, or ambiguities in this RFP.
August 31, 2022	County will publish answers and further clarifications as an addendum to the RFP on the County's website.
September 15, 2022 by 3pm	Responses to the RFP due to Wake County
October 2022	Vendor demonstrations, if deemed necessary
October 2022	Award
November/December 2022	Implementation

2.8 Award

Wake County reserves the right to award a contract, based on initial offers received from Proposers, without discussion and without conducting further negotiations. Under such circumstance, the acceptance of a proposal by the County shall be deemed to be an acceptance of an offer and that such acceptance will be binding upon both parties. The County may also, at its sole discretion, have discussions with those Proposers that it deems to fall within a competitive range. The County may enter into negotiations separately with such Proposers. Negotiations with a Proposer may continue with a Proposer that the County has tentatively selected to award a contract to. The County shall not be deemed to have finally selected a Proposer until a contract has been successfully negotiated and signed by both parties.

2.9 Non-Disclosure of County Information

The Proposer and its agents shall treat all data and information gathered by the Proposer and its agents, including this RFP and all reports, recommendations, specifications, and data as confidential. The Proposer and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, propaganda, and/or in another job or jobs, unless written consent is obtained from the County.

2.10 Retention of Proposer Material

Any and all information submitted in conjunction with this RFP and the evaluation process will not be returned to the respondent.

3 General Terms and Conditions

3.1 Certification

The Proposer hereby certifies that it has carefully examined this Request for Proposal and the Proposer certifies that it understands the scope of the work to be done and that the Proposer has knowledge and expertise to provide the scope of the work. By signature on the response to the RFP, the Proposer certifies that its proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, or equipment, and is in all respects fair and without collusion or fraud, so that all proposals for the purchase will result from free, open and competitive proposing among all vendors. Further, the Proposer certifies that it understands that collusive bidding/proposing is a violation of Federal law and can result in fines, prison sentences, and civil damage awards.

3.2 Conflict of Interest

By submission of a response, the Proposer agrees that at the time of submittal, it: (1) has no interest (including financial benefit, commission, finder's fee, or any other remuneration) and shall not acquire any interest, either direct or indirect, that would conflict in any manner or degree with the performance of Proposer's services, or (2) will not benefit from an award resulting in a "Conflict of Interest." A "Conflict of Interest" shall include holding or retaining membership, or employment, on a board, elected office, department, division or bureau, or committee sanctioned by and/or governed by Wake County. Proposers shall identify any interests, and the individuals involved, on separate paper with the response and shall understand that the County, in consultation with legal counsel, may reject their proposal.

3.3 Assignment

No assignment of the Proposer's obligations or the Proposer's right to receive payment hereunder shall be permitted without prior consent of the County. The Proposer may not sell, assign, transfer, or convey the contract resulting from this RFP, in whole or in part, without the prior written approval from the County.

3.4 Indemnification

The Consultant will indemnify and hold the County harmless from any and all liability, expense, judgment, suit, or cause of action for personal injury, death, or direct damage to tangible property which may accrue against the County to the extent it is caused by the negligence of Consultant, its sub-consultants, or their employees or agents, while performing duties under this Agreement, provided that the County gives the Consultant prompt, written notice of any such claim or suit. The County shall cooperate with Consultant in its defense or settlement of such claim or suit. This section sets forth the full extent of the Consultant's general indemnification of the County from liabilities that are in any way related to Consultant's performance under this Agreement.

3.5 Independent Contractor

It is understood that in the performance of any services herein provided, the Proposer shall be, and is, an independent contractor, and is not an agent or employee of the County and shall furnish such services in its own manner and method, except as required by this contract. Further, the Proposer has, and shall retain the right to exercise full control over the employment, direction, compensation, and discharge of all persons employed by the Proposer in the performance of the services hereunder. The Proposer shall be solely responsible for, and shall indemnify, defend, and save the County harmless, from all matters relating to the payment of its employees, including compliance with Social Security, withholding, and all other wages, salaries, benefits, taxes, exactions, and regulations of any nature whatsoever.

3.6 Payment

Payment for the services rendered pursuant to the Agreement resulting from this RFP shall be made in amounts and at times set forth in the Agreement and shall be made upon receipt of original invoice(s) in accordance and in conformity with payment dates for bills and claims as established by the County. Prior to payment, the Consultant must submit an original dated itemized invoice of services rendered. Photographs or facsimiles of invoices will not be accepted. Any reimbursement for expenses as allowed in the Agreement that are included in the invoice(s) must be supported with attached original billings for such expenses.

3.7 Insurance

The Provider shall obtain, at its sole expense, all insurance required in the following paragraphs and shall not commence work until such insurance is in effect and certification thereof has been received by Wake County's Finance Office. If any required insurance policy expires during the term of this agreement, Provider must provide a certificate of insurance to the Wake County Finance Office as evidence of policy renewal prior to such policy expiration.

Provider signature on this agreement indicates that Provider agrees to the terms of this insurance section and understands that failure to comply may result in cancellation of this agreement at Wake County's option.

Workers' Compensation Insurance, with limits for Coverage A Statutory-State of North Carolina and Coverage B Employers Liability \$500,000 each accident/disease each employee/disease policy limit.

Commercial General Liability – with no limits less than \$1,000,000 per occurrence and \$2,000,000 aggregate, including contractual liability.

Commercial Automobile Liability, with limits of no less than \$1,000,000 per accident for bodily injury and property damage for any vehicle used during performance of contract services, including coverage for owned,



hired, and non-owned vehicles. Evidence of commercial automobile coverage is only necessary if vehicles are used in the provision of services under this Agreement.

Professional Liability (Errors and Omissions) applicable to any professional services provided under with limits of no less than \$1,000,000 each occurrence and \$2,000,000 aggregate.

Cyber Liability Insurance, with limits not less than \$3,000,000 per claim. Coverage shall be sufficiently broad to respond to the duties and obligations undertaken by Provider in this Agreement regarding sensitive information in any form in Provider's care, custody, or control, and shall include but not be limited to third party liability coverage for loss resulting from denial of service, unauthorized access, security failure, system failure, extortion, or any failure to prevent disclosure of sensitive information, including but not limited to Confidential Information (defined herein). Breach/crisis response coverage must include actions required by federal and/or state statutes, and include but not be limited to notification, call center costs, regulatory fines and penalties, investigation, and identity theft and credit report services, with limits sufficient to respond to these obligations.

If any coverage is on a claims-made basis, Provider agrees to maintain a retroactive date prior to or equal to the effective date of this Agreement and to purchase and maintain Supplemental Extended Reporting Period or 'tail coverage' with a minimum reporting period of not less than three (3) years if the policy expires or is cancelled or non-renewed. If coverage is replaced, the new policy must include full prior acts coverage or a retroactive date to cover the effective dates of this Agreement. Provider shall provide a Certificate of Insurance annually to Wake County indicating any claims made coverage and respective retroactive date. The duty to provide extended coverage as set forth herein survives the effective dates of this Agreement.

All insurance companies must be authorized to do business in North Carolina and have an AM Best rating of "A-/VII" or better; or have reasonable equivalent financial strength to the satisfaction of the County's Finance Office. Proof of rating shall be provided to the county upon request.

Insurance with limits no less than those specified above shall be evidenced by a Certificate of Insurance issued by a duly authorized representative of the insurer and dated no more than thirty (30) days prior to the start date of the agreement. In the case of self-insurance, a letter of explanation must be provided to and approved by Wake County Risk Management.

The Provider shall be responsible for providing immediate notice of policy cancellation or non-renewal during the term of this Agreement to the Wake County Finance Office and for three years subsequent for any claims made coverage.

If Provider does not meet the insurance requirements specified above, alternate insurance coverage satisfactory to Wake County may be considered. Any requests for consideration of alternate coverage must be presented by Provider PRIOR TO provision of any services associated with this Agreement.

In the event that Provider uses subcontractors to perform any of the services under this Agreement, then and in that event, Provider shall contractually require such subcontractor(s) to meet all of the requirements of this section.

3.8 Governing Law

This RFP and any contract resulting therefrom shall be governed by and construed according to the laws of the State of North Carolina. Should any portion of any contract be in conflict with the laws of the State of North Carolina, the State laws shall invalidate only that portion. The remaining portion of the contract(s) shall remain in effect.

3.9 Confidential Information/Public Records Law

The County assumes no responsibility for confidentiality of information offered in a proposal. The RFP does not intend to elicit proprietary information. However, if proprietary information is submitted as part of the proposal, the information is to be labeled as such. Proposals are not subject to public inspection until after the contract award. Wake County reserves the right to share any information submitted in response to this RFP or process with any person(s) or firm(s) involved in the review and evaluation process. **Proprietary or confidential information must be clearly labeled as such at the time of initial submission and to the extent provided by N.C.G.S. Chapter 132, will not be made available for public inspection. In the event that a request for inspection is made under public records law, the Proposer will be notified of the request and may participate in any subsequent civil action to compel disclosure of confidential information.**

3.10 Compliance with Laws and Regulations

Proposer must comply with all applicable State and Federal Laws. In the event any Governmental restrictions may be imposed which would necessitate alteration of the material, quality, workmanship, or performance of the items offered on this proposal prior to their delivery, it shall be the responsibility of the successful Proposer to notify Wake County at once, indicating in their letter the specific regulation which required such alterations. The County reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or to cancel the contract.

3.11 Acceptance

Submission of any proposal indicates a Proposer's acceptance of the conditions contained in this RFP unless clearly and specifically noted otherwise in the proposal.

Furthermore, the County is not bound to accept a proposal on the basis of lowest price, and further, the County has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the County's best interests to do so. The County reserves the right to accept or reject any or all of the items in the proposal, and to award the contract in whole or in part and/or negotiate any or all items with individual Proposers if it is deemed in the County's best interest. Moreover, the County reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or not in the best interest of the County.

3.12 Additional Services

The County reserves the right to negotiate additional services with the Vendor at any time after initial contract award.

3.13 Audits

The County reserves the right to audit the Vendor.

3.14 E-Verify

To ensure compliance with the E-Verify requirements of the General Statutes of North Carolina, all contractors, including any subcontractors employed by the contractor(s), by submitting a bid, proposal or any other response, or by providing any material, equipment, supplies, services, etc., attest and affirm that they are aware and in full compliance with Article 2 of Chapter 64, (NCGS64-26(a)) relating to the E-Verify requirements.

3.15 Iran Divestment Act

By signing this agreement; accepting this contract/purchase order; or submitting any bid, proposal, etc., vendors and contractors certify that as of the date of execution, receipt, or submission they are not listed on the Final Divestment List created by the NC Office of State Treasurer pursuant to NCGS 147 Article 6E, Iran Divestment Act, Iran Divestment Act Certification. Vendors and contractors shall not utilize any subcontractor that is identified on the Final Divestment List. In addition, any organization defined under NCGS 147-86.80(2), Divestment from Companies Boycotting Israel, shall not engage in business totaling more than \$1,000 with any company/business, etc. that boycotts Israel. A list of companies that boycott Israel is maintained by the NC Office of State Treasurer, pursuant to NCGS 147-86.81(a)(1). Any company listed as boycotting Israel is not eligible to do business with any State agency or political subdivision of the State.

3.16 Federal Uniform Guidance

If the source of funds for this contract is federal funds, the following federal provisions apply pursuant to 2 C.F.R. § 200.326 and 2 C.F.R. Part 200, Appendix II (as applicable):

Equal Employment Opportunity (41 C.F.R. Part 60); Davis-Bacon Act (40 U.S.C. 3141-3148); Copeland “Anti-Kickback” Act (40 U.S.C. 3145); Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708); Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387); Debarment and Suspension (Executive Orders 12549 and 12689); Byrd Anti-Lobbying Amendment (31 U.S.C. 1352); Procurement of Recovered Materials (2 C.F.R. § 200.322); and Record Retention Requirements (2 CFR § 200.324)

3.17 Anti-Discrimination

In consideration of signing this Agreement, the Parties hereby agree not to discriminate in any manner on the basis of race, natural hair or hairstyles, ethnicity, creed, color, sex, pregnancy, marital or familial status, sexual orientation, gender identity or expression, national origin or ancestry, marital or familial status, pregnancy, National Guard or veteran status, religious belief or non-belief, age, or disability with reference to the subject matter of this Contract. The Parties agree to comply with the provisions and intent of Wake County Ordinance SL 2017-4. This anti-discrimination provision shall be binding on the successors and assigns of the Parties with reference to the subject matter of this Contract.

4 Current Environment

4.1 Wake County Government

Wake County Government functions under a Council/Manager form of government. The County Manager is appointed by a seven-member Board of Commissioners. Wake County Government has a general operating budget of \$1.3 billion, employs approximately 5,000 employees and contractors across 21 departments, 45+ divisions, and is an award-winning leader in communication and technology initiatives (Top 10 Digital County in the Nation). The County's strategy is guided by the Board of Commissioners' Goals and Objectives. The County strives to be a data-driven organization with a heavy emphasis on automation, self-service, technology integration and strong, two-way communication with all residents and stakeholders.

4.2 Wake County Child Welfare Division

Wake County Child Welfare division is part of Wake County Health & Human Services with over 300 staff and serving more than 20,000 Children and Families annually. Wake County Child Welfare is looking for a Case Management solution that will provide efficient and effective case management.

5 Detailed Submission Requirements

5.1 Proposal Format

Proposers shall prepare their proposals in accordance with the instructions outlined in this section. Each Proposer is required to submit the proposal in a sealed package. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of the RFP. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included. The proposal should be organized into the following major sections with tabs for each section:

Introduction

This section of the response should include a title page, letter of transmittal, and table of contents.

Section 1: Executive Summary

This section of the response should be limited to a brief narrative summarizing the Proposer's proposal. The executive summary shall, at a minimum, include an identification of the proposed project team, responsibilities of the project team, and a summary of the proposed services. This section should highlight aspects of the proposal that make it superior or unique in addressing the needs of the County. The executive summary should identify the primary engagement contact. Contact information should include a valid e-mail address, fax number, and a telephone number.

Section 2: Scope of Services

This section of the response should include a general discussion of the Proposer's overall understanding of the project and the scope of work proposed as outlined in Sections 1.3.1 to 1.3.4.

Section 3: Company Background and Consultant Team Relevant Experience

This section of the response must provide the following information about the submitting Proposer's company, so that the County can evaluate the Proposer's stability and ability to support the commitments set forth in response to the RFP. The County, at its option, may require a Proposer to provide additional support or clarify requested information.

Company Background

- ☐ How long the company has been in business.
- ☐ A brief description of the company size and organizational structure.
- ☐ How long the company has been providing services to clients similar to the County.
- ☐ Any material (including letters of support or endorsement from clients) indicative of the Proposer's capabilities.
- ☐ Identify any litigation or governmental or regulatory action pending against the company that might have a bearing on your ability to provide services to the County.
- ☐ Describe the company's contractual relationships, if any, with other organizations that will provide services described in your proposal.

Consultant Team Experience

- ☐ Identify your proposed team indicating who is responsible for the key roles; provide an organizational chart showing lines of communication and levels of authority;
- ☐ Include the résumés of staff who will work on the engagement. If they are working on only certain portions of the project, indicate this on their résumé;
- ☐ Given that the County will be evaluating several proposals, describe why you feel that your services, from a professional and technical perspective, are the best fit for the County environment. Describe the distinguishing features the County should know about your services and company.

Section 4: Client References and Similar Assignments

The County considers references to be important in its decision to award a contract. Failure to provide this information will result in the proposal being considered non-responsive.

This section of the response should provide a comprehensive client listing with year(s) in which your firm provided services. Also provide at least three current clients who we may contact. References should be clients who are government agencies similar in size and complexity to the County. Provide their company name and mailing address, telephone, and email of the contact person.

	Reference #1	Reference #2	Reference #3
Company			
Contact Name			
Contact Title			
Contact Phone			
Mailing Address			
Email Address			

Section 5: System Requirement Responses

System requirements are provided in Attachment A. Responses to the system requirements listed in Attachment A must be provided in this section of the Proposer's response, in spreadsheet format. The first tab of the spreadsheet contains detailed response definitions. "Yes/No," "Partial," and "N/A"

answers are acceptable when appropriate, but concise detailed descriptions are strongly encouraged, particularly when “Partial” is selected.

Requirements are organized in spreadsheet tabs by the following categories:

- Instructions
- Mandatory Tech. Requirements
- Preferred Tech. Requirements
- Technical Questions
- Child Welfare Unit/Module Requirements

Section 6: Cost Proposal

This section of the response must provide an estimate of costs. The County reserves the right to contact Proposers on cost and scope clarification at any time throughout the selection process and negotiation process. The County is asking Proposers to estimate costs for all categories with the understanding that they may have to make assumptions. Assumptions include:

- At present, approximately 300 employees will have client interactions that will require access to the case management system.
- At present, approximately 20,000 children/families are served annually in The County.
- The number of users and clients managed will increase in subsequent years.
- Required integrations include single sign on and connectivity with State, County, and third-party applications. See Attachment A for details.

Items that should be included in this cost section include:

Cost Category	Cost (US Dollars)	Unit (e.g. year, user)	Cost Details*
Licenses fees	\$		
Project Management fees	\$		
Implementation fees	\$		
Training fees	\$		
Custom work fees	\$		
Ongoing support fees	\$		
Fees for integrations as specified in section Attachment A	\$		
Additional costs not listed above necessary to meet requirements of this RFP	\$		

*Cost details must address the following, as applicable:

- What services are included in the first-year costs?
- Are there payment requirements, such as partial payment prior to receiving services?
- Do license costs vary by user role? If so, specify costs per role.
- Are user licenses named or concurrent?
- Are there annual cost escalations?
- If there are training costs, how are the costs calculated (e.g. fixed, a la carte, choice of multiple training packages)? Describe each option/package in detail.

6 Evaluation Criteria

6.1 Selection Participants

The County has established a team of staff to evaluate vendor responses. This team of employees will be responsible for the evaluation and rating of the proposals and conducting interviews.

6.2 Evaluation of Proposals

Responses will be evaluated based on the following criteria:

- Compliance to the RFP requirements; quality, clarity and completeness of services proposed in relation the scope of work the response
- Respondent's proven, knowledge, and experience
- Client references
 - Capability of the Proposer to undertake and support services as described by this Request for Proposals based on reputation and customer references regarding the Vendor's performance for organizations with needs similar to the County's, particularly in the government sector
- Cost effectiveness and value of proposal
- Other criteria deemed appropriated by the County Project Team