

**State of Maine
Master Score Sheet**

RFP# 202401003					
Consult Tracking System					
Bidder Name:		Brite Systems, Inc.	Conduent Public Health Solutions, Inc.	DECISIONS, LLC	Deloitte Consulting LLP
Proposed Cost:		\$2,151,942.69	\$8,990,001.00	\$461,198.00	\$2,743,844.66
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	25.00	18.00	10.00	7.00	20.00
Section III: Proposed Services	50.00	35.00	N/A	N/A	48.00
Section IV: Cost Proposal	25.00	25.00	N/A	N/A	19.61
TOTAL	<u>100.00</u>	<u>78.00</u>	<u>Disqualified</u>	<u>Disqualified</u>	<u>87.61</u>
Bidder Name:		Eceptionist, Inc.	Elixir Lab USA Inc (d/b/a Cadinality.ai)	Spruce Technology, Inc.	Tech Mahindra Americas, Inc.
Proposed Cost:		\$1,394,192.00	\$2,747,499.00	\$2,143,260.00	\$1,528,816.00
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	25.00	17.00	15.00	13.00	11.00
Section III: Proposed Services	50.00	27.00	28.00	N/A	N/A
Section IV: Cost Proposal	25.00	N/A	N/A	N/A	N/A
TOTAL	<u>100.00</u>	<u>Disqualified</u>	<u>Disqualified</u>	<u>Disqualified</u>	<u>Disqualified</u>

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



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

Award Justification Statement RFP# 202401003 Consult Tracking System

I. Summary

Through RFP# 202401003, the Department sought proposals for a Consult Tracking System. Eight (8) Bidders responded: Brite Systems, Inc., Conduent Public Health Solutions, Inc., DECISIONS, LLC, Deloitte Consulting LLP, Eceptionist, Inc., Elixir Lab USA, Spruce Technology, Inc., and Tech Mahindra Americas, Inc. Through the evaluation process, Deloitte Consulting LLP was the highest scoring Bidder and determined to provide the best value to the State of Maine.

II. Evaluation Process

An evaluation team comprised of State employees, applied the consensus method in scoring the Bidders Qualifications & Experience and Proposed Services. Scores for the Cost Proposal were assigned using a mathematical formula.

III. Qualifications & Experience for Deloitte Consulting LLP

- Provided three (3) project examples indicating a familiarity with the requirements at a general level with one (1) example similar to the RFP requirements.

IV. Proposed Services for Deloitte Consulting LLP

- Plans to utilize COTS SaaS Salesforce.
- Identified additional features of reporting beyond the basic requirements and detailed those features as well and provided Maine specific examples.
- Provided extensive details on data conversion process including deployment certification.
- Timeline provided with 4-month "go live" proposal.
- Provided an informative demonstration, Maine specific and in-line with the requirements of the RFP.

V. Cost

Deloitte Consulting LLP proposed a cost of \$2,743,844.66.

VI. Conclusion

Out of 100 possible points, Deloitte Consulting LLP (Deloitte) scored 87.61, which was the highest point total awarded by the Evaluation Team. The strengths of Deloitte's proposal include a strong organization with relevant experience, a complete proposed scope of service, and a competitive cost proposal. The Evaluation Team has determined the proposal submitted by Deloitte represents the best value to the State of Maine.

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May-10-2024

Via Electronic Mail: jmarshall@britesys.com

Brite Systems, Inc.
Joshua Marshall
101 W. Ohio Street, Suite 2000
Indianapolis, IN 46204

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear Joshua Marshall,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

- Deloitte Consulting LLP

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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).

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

Sincerely,

DocuSigned by:

Veronica Robichaud

2292FAA6880E43B...

Veronica Robichaud
Chief Operating Officer
Maine Center for Disease Control and Prevention

DocuSigned by:

Debra Downer

5DC6307B8558482...

Debra Downer
Deputy Director for Competitive Procurement
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May-10-2024

Via Electronic Mail: Mark.marostica@conduent.com

Conduent Public Health Solutions, Inc.
Mark Marostica, Director of Sales
100 Campus Drive, Suite 200E
Florham Park, NJ 07932

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear Mark Marostica,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

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Maine Center for Disease Control and Prevention

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May-10-2024

Via Electronic Mail: kevin.lindquist@decisions.com

DECISIONS, LLC
Kevin Lindquist, EAE
9493 N 3940 W
Cedar Hills, UT 84062

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear Kevin Lindquist,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

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Veronica Robichaud
Chief Operating Officer
Maine Center for Disease Control and Prevention

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May-10-2024

Via Electronic Mail: Dabetts@deloitte.com

Deloitte Consulting LLP
David Betts
2600 One PPG Place
Pittsburgh, PA 15222

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear David Betts,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

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May-10-2024

Via Electronic Mail: Dawniela.hightower@eceptionist.com

Eceptionist, Inc.
Dawniela Hightower, Sr. Director
405 Main Street, Suite 800A
Houston, TX 77002

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear Dawniela Hightower,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

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May-10-2024

Via Electronic Mail: anna.harper@cardinality.ai

Elixir Lab USA Inc (d/b/a Cardinality.ai)
Anna Harper, Chief Administrative Officer- CAO
267 Kentlands Boulevard, Suite 5092
Gaithersburg, MD 20878

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear Anna Harper,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

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May-10-2024

Via Electronic Mail: kmazza@sprucetech.com

Spruce Technology Inc.
Kristen Mazza, SVP, Operations
11449 Bloomfield Avenue, Suite G
Clifton, NJ 070712

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear Kristen Mazza,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

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May-10-2024

Via Electronic Mail: Arpit.shastri@techmahindra.com

Tech Mahindra Americas Inc.
Arpit Shastri, Client Partner
5700 Democracy Drive
Plano, TX 75024

SUBJECT: Notice of Conditional Contract Award under RFP #202401003 Consult Tracking System

Dear Arpit Shastri,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

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Deputy Director for Competitive Procurement
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Brite Systems, Inc.

DATE: February 23, March 6, and 28, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	18.00
Section III. Proposed Services	50.00	35.00
Section IV. Cost Proposal	25.00	25.00
<u>Total Points</u>	<u>100.00</u>	<u>78.00</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Brite Systems, Inc.

DATE: February 23, March 6, and 28, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Brite Systems, Inc.

DATE: February 23, March 6, and 28, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	18.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) relevant project examples demonstrating their expertise and experience. • Founded in 2006. • 17 Years experience with Salesforce projects, 10 years-experience in tracking system services implementing solutions in multiple states. • Capability Maturity Model Integration (CMMI) Level 3 Certification indicates business is proactive with organization-wide standards. • ISO 9001:2015 accreditation - quality management system. • Salesforce Crest (Gold) Consulting Partner. • Salesforce consulting partner with 75 experts on staff.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Provided Enterprise organizational chart but did not provide the proposed project team or whom the team reports to. • Indicates details and staffing plan are located in Appendix F.
4. Litigation
<ul style="list-style-type: none"> • Indicated "Not applicable"
5. Financial Viability
<ul style="list-style-type: none"> • Appears financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Brite Systems, Inc.

DATE: February 23, March 6, and 28, 2024

**EVALUATION OF SECTION III
Proposed Services**

Stage Two- Proposed Services	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50.00	35.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Specified COTS SaaS installation. • Can integrate with REDCap via Salesforce SOA, but also offers an alternative approach. • Can integrate with MaineIT Active Directory and has multiple authentication options. • Verifies three (3) environments. • Verified the solution is browser agnostic. • Defined the development and project plan. • Specified what existing architecture will be leveraged to produce solution (Salesforce Service Cloud, Community Cloud, MuleSoft, Shield, and Tableau). • Addressed Data Quality, Usability, Reporting, Data Conversion requirements and describes ability to ensure the solution meets the needs. • Will use OmniScript to configure fields. • Proposed two (2) different ways to attach files. • Identifies additional features beyond the basic requirements and defines those features as well. • Identifies additional features beyond the basic Reporting requirements and defines those features as well. • Robust reporting dashboards. • Can create custom reports. • Plans to utilize Salesforce report builder. • Allows for multiple administrators and unlimited users depending on edition and licenses. • 99.9% uptime, 4-hour recovery point objective, and 12-hour recovery time objective. • Defined data redundancy and backup solutions. • Plans to use ETL – (Extract, Transform, Load) for Data Migration approach.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Brite Systems, Inc.

DATE: February 23, March 6, and 28, 2024

- Solution prioritizes reliability and low latency.
- Indicated their application response time is less than 30 seconds.
- Warranty for initial implementation.
- Additional modifications or additions will require a structured change management process.
- Plans to perform regular updates (three (3) software upgrades a year).
- Four (4) severity levels, escalation plan identified, helpdesk support.
- Detailed option for Premier Success plan for support (24-hour phone support, 1-hour response time for critical issues, access to training, connection with groups).

B. Technical Requirements

- Addressed MaineIT Policies and Standards.
- Listed data centers outside of the U.S.
- Plans to develop a cybersecurity governance and policy development framework to align with requirements.

2. Staffing

- Provided resumes for seven (7) project staff including Project Manager.
- Provided staffing plan with all staff to be allocated 100% to this project.

3. Implementation - Work Plan

- Workplan provided including six (6) phases with deliverables, estimated time frames, and which staff would be working on that phase.
- Phase 3 is missing.
- Timeline is 12 months (provided in visual format).
- Described staff responsibilities.
- Will provide weekly status reports in whatever format the Department chooses.
- Will track time using DevOps.

Stage Three- Demonstrations

- Demonstration did not highlight most of the RFP requirements and was not Maine specific.
- Seemed to rely heavily on Department staff for configurations and customizations.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Brite Systems, Inc.

DATE: February 23, March 6, and 28, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Stage Four- Cost Proposal						
Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,151,942.69	÷	\$2,151,942.69	x	25.00 points	=	25.00

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Conduent Public Health Solutions, Inc.

DATE: February 23, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	10.00
Section III. Proposed Services	50.00	N/A
Section IV. Cost Proposal	25.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>N/A</u>

Did not meet the minimum score in Stage 1 – Organization Qualifications and Experience to move to Stage 2 – Proposed Services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Conduent Public Health Solutions, Inc.

DATE: February 23, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Conduent Public Health Solutions, Inc.

DATE: February 23, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	10.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Conduent State and Local Solutions, Inc was issued a Corrective Action Plan (CAP) from the Department on January 18, 2024, for out of compliance (data breach). • Provided three (3) project examples indicating experience with disease surveillance but did not provide specific details of experience with consult tracking. • 22 years' experience with eighty (80) Maven software professionals. • Experience working with the State on multiple contracts.
2. Subcontractors
<ul style="list-style-type: none"> • Plans to utilize Infinite Computer Solutions with 15 years of experience with the Bidder.
3. Organizational Chart
<ul style="list-style-type: none"> • Provided Enterprise organizational chart but did not provide the proposed project team or whom the team reports to.
4. Litigation
<ul style="list-style-type: none"> • Indicates none
5. Financial Viability
<ul style="list-style-type: none"> • Provided extensive financial records making it difficult to locate the relevant information required. • Submitted Securities and Exchange Commission (SEC) form 10-K for parent company Conduent Incorporated (Nasdaq: CNDT).
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: DECISIONS, LLC

DATE: February 23, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	7.00
Section III. Proposed Services	50.00	N/A
Section IV. Cost Proposal	25.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>N/A</u>

Did not meet the minimum score in Stage 1 – Organization Qualifications and Experience to move to Stage 2 – Proposed Services.
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: DECISIONS, LLC

DATE: February 23, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: DECISIONS, LLC

DATE: February 23, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	7.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) project examples with limited details and timeframes. • No code configurable SaaS solutions since 2010. • Indicated having healthcare experience with call center technology but did not provide details. • Indicated being both a provider of the technology and implementation partner.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Did not provide an enterprise-wide organization chart showing officers, major organization components, and the project team proposed and whom the project team reports to.
4. Litigation
<ul style="list-style-type: none"> • Indicates none
5. Financial Viability
<ul style="list-style-type: none"> • Did not provide balance statements or income statements.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Deloitte Consulting LLP

DATE: February 23, March 6, and 28, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	20.00
Section III. Proposed Services	50.00	48.00
Section IV. Cost Proposal	25.00	19.61
<u>Total Points</u>	<u>100.00</u>	<u>87.61</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Deloitte Consulting LLP

DATE: February 23, March 6, and 28, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Deloitte Consulting LLP

DATE: February 23, March 6, and 28, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	20.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) project examples indicating a familiarity with RFP requirements at a general level. One example, for the Commonwealth of Pennsylvania, appears to be similar to the RFP requirements. • Providing services for 175 years, over 20,000 professionals and 13000+ Salesforce specialists. • Experience working in Maine for 15+ years and provided examples. • Public health experience in 47 states. • Implemented similar solutions in 9 other state and US CDC. • Utilizes GovConnect platform, built on Salesforce. • Largest integrator of Salesforce solutions in government • Number 1 Leader for Salesforce and SaaS/PaaS no code low code platforms.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirements.
4. Litigation
<ul style="list-style-type: none"> • Acknowledging litigation but did not 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.
5. Financial Viability
<ul style="list-style-type: none"> • Appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Deloitte Consulting LLP

DATE: February 23, March 6, and 28, 2024

**EVALUATION OF SECTION III
Proposed Services**

Stage Two- Proposed Services	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50.00	48.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Using COTS SaaS Salesforce. • Hosted in AWS GovCloud. • Includes three (3) environments plus some partial copy sandboxes. • Defines scope, acknowledges key capacities, and identifies expected outcomes. Provides high level system architecture (GovConnect CTS) and defines project management approach (leveraging Azure DevOps). • Can integrate with REDCap. • Can integrate with Active Directory. • Addressed Data Quality, Usability, and Reporting, Data Conversion requirements and describes ability to ensure the solution meets the needs. • Out of the box deduplication. • Built in feature to attach files. • Identifies additional features of Reporting beyond the basic requirements and defines those features as well and provided Maine specific examples. • Allows for multiple administrators and can scale up rapidly to 150K users. • 99.9% uptime, 4-hour recovery point objective, and 12-hour recovery time objective. • Identified that there are data redundancy and backup solutions. • No limit on administrators. • Provides extensive details on data conversion process including deployment certification. • Comprehensive data profiling phase. • Utilizes Salesforce data import wizard. • Strong collaboration with admins to data map. • Utilizes load balancing to ensure minimal latency and short load times. • Horizontal scaling for screen loading times less than one (1) second.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Deloitte Consulting LLP

DATE: February 23, March 6, and 28, 2024

- Dedicated Maintenance and Operations teams to provide support.
- Propose monthly bug fixes and minor configuration changes.
- Upgrade system three (3) times a year.
- Four (4) categories of response with resolution times from a few hours to 7 business days.
- Planned scheduled maintenance during off-peak hours.

B. Technical Requirements

- Demonstrated experience working with Maine IT and ability to comply with Policies and Standards.
- Provided Cyber Risk Framework.
- Will adapt to Maine specific requirements as necessary.
- System is built on NIST 800-53 Rev 5 baseline.
- FedRAMP moderate certified.
- Certified Soc 2 Type 2.

2. Staffing

- Provided staffing with management team identified.
- Provided titles and job descriptions for Management team and Implementation Team.
- Provides basic time allocation (part time vs full time) for each team member.

3. Implementation - Work Plan

- Provides timeline with 4-month “go live” proposal.
- Describe each step and identifies key staff and estimated time frame.

Stage Three- Demonstrations

- Presentation was informative, Maine specific, and in-line with the requirements of the RFP.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Deloitte Consulting LLP

DATE: February 23, March 6, and 28, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Stage Four- Cost Proposal						
Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,151,942.69	÷	\$2,743,844.66	x	25.00 points	=	19.61

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Eceptionist, Inc.

DATE: February 23 & March 6, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	17.00
Section III. Proposed Services	50.00	27.00
Section IV. Cost Proposal	25.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>N/A</u>

Did not meet the minimum score in Stage 2 – Proposed Services to move to Stage 3 – Demonstrations.
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Eceptionist, Inc.

DATE: February 23 & March 6, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Eceptionist, Inc.

DATE: February 23 & March 6, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	17.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) relevant project examples demonstrating their expertise and experience working with healthcare software. • 20+ years in business. • Offers EceptionistCX (COTS but configurable) software solution. • Experience in providing complex solutions into a baseline software.
2. Subcontractors
<ul style="list-style-type: none"> • Plans to subcontract with Public Consulting Group (PCG).
3. Organizational Chart
<ul style="list-style-type: none"> • Provided a detailed organizational chart.
4. Litigation
<ul style="list-style-type: none"> • Indicates none
5. Financial Viability
<ul style="list-style-type: none"> • Did not provide balance sheets and income loss statements.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003
RFP TITLE: Consult Tracking System
BIDDER: Eceptionist, Inc.
DATE: February 23 & March 6, 2024

**EVALUATION OF SECTION III
Proposed Services**

Stage Two- Proposed Services	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50.00	27.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Azure cloud based HIPPA compliant solution. • Highly configurable. • Proposed a web-based form instead of integrating with REDCap (although integration is possible if necessary). • Can provide three (3) environments. • Verifies browser agnostic SaaS solution. • Supports Azure Active Directory and provided diagram of integration. • Provided limited details to Data Quality requirements. • Provided limited details to Usability requirements. • Did not address administrator abilities. • Proposes utilizing SSRS and PowerBI tools for reporting. • Provided sample dashboard. • Proposes five (5) custom reports and one (1) dashboard included. • Data can be exported. • Did not address ability to allow for 3-5 concurrent administrators. • No limit to named users with up to 500 concurrent users. • 99.95% uptime. • Uses Azure services for back-up and retention. • Confirms recovery time under 24 hours (longest time in company history is 2 hours) • Addresses all Data Conversion requirements describing ability to ensure the solution meets the needs. • Average response time of 0.5 seconds. • High availability and redundancy. • Uses Azure application gateway to load balance incoming traffic.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Eceptionist, Inc.

DATE: February 23 & March 6, 2024

- Once operation will transition to Tier 2 Service Support with support available for super users.
- Help desk solution, self-help tools, and online help guide.
- Support M-F 7AM-7PM CT, 24-hour support for critical issues.
- Tier 1 service is optional (with additional cost) with support available for all users.
- Three (3) severity levels with resolution time from 24 hours to 10 business days.
- 3-4 minor releases per year with 1 major release every 9-18 months.
- Has a defined release testing process.

B. Technical Requirements

- Acknowledged being compliant with all policies.
- Indicated any research of inappropriate access is a time and materials charge.

2. Staffing

- Provided names, titles, and basic resumes for team members/project lead.
- Public Consulting Group (PCG) will provide technical consulting services and be responsible for the application design, solution documents and requirements traceability matrix.
- Provides role and estimated percentage of time.
- Proposed 2.35 FTE.
- Seven (7) proposed staff with five to seven (5-7) Maine CDC resources.

3. Implementation - Work Plan

- 118-day implementation plan.
- Provide a plan of operations within 30 days.
- Provided project timeline table including major tasks.
- Did not identify specific person/positions responsible.
- Identified tasks to be led by PCG.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23 & March 6, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	15.00
Section III. Proposed Services	50.00	28.00
Section IV. Cost Proposal	25.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>N/A</u>

Did not meet the minimum score in Stage 2 – Proposed Services to move to Stage 3 – Demonstrations.
--

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23 & March 6, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23 & March 6, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	15.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) project examples. • Established in 2017. • Healthcare and government experience. • Worked with four (4) other states. • Utilizes EmpowerHealth Consulting and Tracking System (EH.CTS) which is a low code platform.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Did not provide a project level organizational chart.
4. Litigation
<ul style="list-style-type: none"> • Indicated none
5. Financial Viability
<ul style="list-style-type: none"> • Appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a certificate of insurance which has now expired.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23 & March 6, 2024

**EVALUATION OF SECTION III
Proposed Services**

Stage Two- Proposed Services	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50.00	28.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Browser agnostic Cloud based SaaS system designed low code. • Can integrate with Active Directory. • Can integrate with REDCap or create an online form equivalent. • Normally uses five (5) environments but can conform to three (3). • Addresses Data Quality and Usability requirements and describes ability to ensure the solution meets the needs. • Can integrate with the State’s Tableau server. • Can generate custom reports and queries. • Uses Role Based Access Control to provide data security. • Built in admin console. • Can handle more than five (5) admins. • Can rapidly scale up to 1000 users or more. • 99.5% uptime or higher. • No more than two (2) hours of data loss. • Recovery Time Objective (RTO) of four (4) hours. • Data mapping between source and target. • Will use User Acceptance Testing (UAT) to ensure data has been loaded correctly. • Proposes User Interface (UI) smoke testing and Integrity/sanity verifications. • Acknowledged ability to meet Performance Metrics requirements. • Twelve (12) months maintenance and operations support post implementation. • Support will transition to the State of Maine with escalated support (level 2 and 3) provided. • Will create a searchable Knowledge Base for Level 1 Help Desk users. • Proposed SLA’s included (four (4) severity levels). • Did not provide information on routine patches/upgrades.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23 & March 6, 2024

B. Technical Requirements
<ul style="list-style-type: none">• Provided limited details on MaineIT Policies and Standards.• Did not address each NIST 800-53 Rev 5 requirement and plans to provide a Cloud first solution using AWS to address some of these requirements.
2. Staffing
<ul style="list-style-type: none">• Provided job descriptions but did not include minimum qualifications.• Provided position titles and estimated time allocation.• Provided plan for project delivery.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided a five (5) phase plan.• Six (6) months go live timeframe.• Provided timeline chart.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Spruce Technology Inc.

DATE: February 23, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	13.00
Section III. Proposed Services	50.00	N/A
Section IV. Cost Proposal	25.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>N/A</u>

Did not meet the minimum score in Stage 1 – Organization Qualifications and Experience to move to Stage 2 – Proposed Services.
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Spruce Technology Inc.

DATE: February 23, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Spruce Technology Inc.

DATE: February 23, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	13.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Experience in healthcare and government. • It is unclear if the Bidder utilizes COTS or SaaS or if any of the projects provided were relevant to the requirements. • Established in 2006.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Did not provide a project level organizational chart.
4. Litigation
<ul style="list-style-type: none"> • Indicated none
5. Financial Viability
<ul style="list-style-type: none"> • Appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Tech Mahindra Americas Inc.

DATE: February 23, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Sara Robinson, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	11.00
Section III. Proposed Services	50.00	N/A
Section IV. Cost Proposal	25.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>N/A</u>

Did not meet the minimum score in Stage 1 – Organization Qualifications and Experience to move to Stage 2 – Proposed Services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Tech Mahindra Americas Inc.

DATE: February 23, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER: Tech Mahindra Americas Inc.

DATE: February 23, 2024

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

Stage One- Qualifications and Experience	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	11.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) project examples unrelated to the requirements of the RFP. • 141,000 professionals and 1120+ clients. • Has a public sector practice with government experience and more than 15 years' experience. • Multiple platforms including Salesforce, Dynamics, Azure, AWS, Pega etc.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Did not provide an enterprise level organizational chart.
4. Litigation
<ul style="list-style-type: none"> • Indicated none
5. Financial Viability
<ul style="list-style-type: none"> • Only provided 2 years of financial statements, appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided an expired certificate of insurance (2022).

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Will require submittal of Vendor Code Application if awarded. • P - CMMI Level 3 Certification (Capability Maturity Model Integration) – indicates business is proactive with organization-wide standards. • P – ISO 9001:2015 accreditation – quality management system • P – In business for over 18 years. • P – Experience with multiple government organizations. • P – Project examples indicate familiarity with RFP requirements at a general level.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • High-level organization chart provided with further details in Appendix F
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • P – Six years of financial statements provided. • P – Financially stable with increases in assets over time
6. Certificate of Insurance
<ul style="list-style-type: none"> • P – Provided • I – Split between 2 insurers (not an issue)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<p>1. <u>System Capabilities:</u></p> <ul style="list-style-type: none">a. Browser-agnostic, including Chrome, Firefox, Edge, and Safari.<ul style="list-style-type: none">i. COTS-SaaS softwareb. Has the ability to capture patient-level confidential data, separate from initial consult information, through:<ul style="list-style-type: none">i. Integrated with the existing local REDCap orii. Proposed an alternate, equivalent solution if REDCap integration not possible in some circumstances.c. Integration with MaineIT Active Directory using Salesforce<ul style="list-style-type: none">i. Comply with the MaineIT Azure Enterprise Application Onboarding requirements.<ul style="list-style-type: none">a. Single Sign On (Q Satisfactory given recent developments?)b. Security Assertion Markup Languagec. Authentication will be integrated with LDAP (Lightweight Directory Access Protocol)d. Includes the three (3) mandatory environments using Seven (7) Sandbox areas
<p>2. <u>Data Quality</u></p> <ul style="list-style-type: none">a. Create rules for field entries, including:<ul style="list-style-type: none">i. Rules for required fields as determined by the Department will be created.ii. Will automatically populate the county.iii. Standard content validationiv. Spell check capabilities.v. Date verification based on nine (9) criteria.vi. Duplicate records check.b. Create rules to apply to assignments, including:<ul style="list-style-type: none">i. Ability to determine what email the consult is sent to depending on the topic.<ul style="list-style-type: none">(1) Email to case.(2) Assignment rules.(3) Auto-Response Rules(4) Can define custom logic for email assignments <ul style="list-style-type: none">• Two methods to attach files to a consult case by users.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

- 3. Usability** – ensure the proposed solution provides:
- a. Search capabilities:**
 - i.** Global and Instant Search.
 - ii.** Search Filters.
 - iii.** Wildcard Searches.
 - iv.** AND, OR & NOT searches.
 - v.** Search in Files.
 - vi.** Einstein Search (Q- Uses Artificial Intelligence)
 - vii.** A chronological history of the caller and the ability to see all consults.
 - b. Multiple Audit Trail methods:**
 - i.** Records Modification Fields.
 - ii.** Field History Tracking.
 - iii.** Failed Logins.
 - iv.** Setup Audit Trail
 - v.** Identity Verification History
 - c. Autofill options:**
 - i.** The system will auto-generate suggestions as the user types.
 - ii.** Customizable canned notes or templates for standard responses.
 - d. Email:**
 - i.** Electronic delivery to disease.reporting@maine.gov.
 - ii.** Will email a receipt to the person submitting the consult.
 - iii.** Automatic Consult assignment based on pre-defined criteria.
 - iv.** Notifications when a record is updated to user and relevant stakeholders.
 - v.** Automatic email notification to staff when assigned a consult.
 - e. Workflow design:**
 - i.** Forms will be automatically cleared upon submission.
 - ii.** Ability to bypass disease reporting when not applicable.
 - iii.** A new consult button so open screens do not have to be closed.
 - iv.** Ability to enter multiple incidents by the same caller – supported.
 - v.** A field to check for repeat calls for the same consult dedicated field.
 - vi.** Ability to track repeat consult calls and flag repeat callers based on predetermined criteria.
 - vii.** A consult closure button for final resolution.
 - f. History log:**
 - i.** Detailed Notes entry within a call or consult.
 - ii.** Automatic date/time stamps for notes entered.
 - iii.** A custom tracking number for each consult.
 - g. Administration, including administrator ability to:**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

<ul style="list-style-type: none"> i. Add new consult topics by Administrators. ii. Add new users quickly with role-based access. <ul style="list-style-type: none"> (1) Basic ability to add/remove permissions. iii. Activate/inactivate lookup field. <ul style="list-style-type: none"> (1) Hide variables that are no longer in use. (2) Add/Remove lookup records to dropdown fields.
<p>4. <u>Reporting:</u></p> <ul style="list-style-type: none"> a. Reporting dashboards <ul style="list-style-type: none"> i. How many consults have been sent out? Will be provided. ii. How many consults are assigned to each person? Will be provided. iii. How many consults were created per topic? Detailed Statistics will be available. iv. Report by person by time frame. Will be provided. v. Year-to-year trends. Will be provided both Geographically and Topically vi. Count/summary of calls by town and by topic. b. Ability to extract data in a standard format such as .csv. Will be provided including. .xls (Excel). c. Ability for custom self-service ad hoc reports and queries. Will be provided with the ability to choose export format. <ul style="list-style-type: none"> i. P – Sample screens provided.
<p>5. <u>Product Management Administration – ensure the proposed solution:</u></p> <ul style="list-style-type: none"> a. More than 3-5 concurrent administrators based on the edition and number of licenses. b. No maximum number of concurrent users c. Average uptime of 99.9+ percent d. 4-hour recovery point objective (RPO) and 12-hour recovery time objective (RTO).
<p>6. <u>Data Conversion:</u></p> <ul style="list-style-type: none"> a. Will be provided. b. Will be provided. c. Will be provided. <p>P – Detailed plan provided with a very good explanation and graphics.</p>
<p>7. <u>Performance Metrics – ensure the proposed solution:</u></p> <ul style="list-style-type: none"> a. Will be provided with a detailed explanation but did not specify the number of concurrent users b. Application response time will be less than 30 seconds. Does not mention Screen load wait times.
<p>8. <u>Support, Administration, and Maintenance</u></p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

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BIDDER NAME: Brite Systems, Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

- | |
|--|
| <ul style="list-style-type: none">a. Attachment 7 provides a detailed explanation including warranty, System Upgrades, changes in scope, Communication, and a Change Request Protocol.b. Issues divided into four different Severity Levels ranging from Level 1 – Critical to Level 4 – Medium<ul style="list-style-type: none">i. Levels 1 and 2 coverage includes weekends and holidays.ii. Levels 3 and 4 are local business hours only. |
|--|

B. Technical Requirements

- | |
|--|
| <ul style="list-style-type: none">• P – Extensive detailed explanation of how the bidder will comply with MaineIT Policies and Standards |
| <ul style="list-style-type: none">• P – Extensive detailed explanation of how the bidder will achieve NIST 800-53 Rev 5 |

2. Staffing

- | |
|--|
| <ul style="list-style-type: none">• Detailed resumes provided for all including the Project Manager. |
| <ul style="list-style-type: none">• N/A |
| <ul style="list-style-type: none">• Staffing plan included for all stages of their proposed solution including FTEs. |

3. Implementation - Work Plan

- | |
|--|
| <ul style="list-style-type: none">• Very well described work plan. |
|--|

Stage Three- Demonstrations

- | |
|---|
| <ul style="list-style-type: none">• The demonstration appeared to be a generic presentation, not Maine focused.• Details were lacking.• Did not meet the requirements of the RFP. |
|---|

Stage Four- Cost Proposal

- | |
|---|
| <ul style="list-style-type: none">• Lowest Cost |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: 3/3/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Founded Feb 6 2006 • 17 years experience with Salesforce projects • More than 10 years providing consult tracking system • Salesforce Crest (Gold) Consulting partner
2. Subcontractors
<ul style="list-style-type: none"> • None listed
3. Organizational Chart
<ul style="list-style-type: none"> • Provided
4. Litigation
<ul style="list-style-type: none"> • Says none applicable
5. Financial Viability
<ul style="list-style-type: none"> • Provided financial info – appear viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: 3/3/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Will use Sales Force – has the ability to do all of these things. • Integrates with REDCap • Will use Brite Systems for integration
<ul style="list-style-type: none"> • Sales force system has a lot of validation rules you can implement • Field history tracking • Provided in detail how they would handle every line • Will use OmniScript to configure fields • Two different ways to attach files
<ul style="list-style-type: none"> • Answered a resolution for every item • Met requirements
<ul style="list-style-type: none"> • Robust reporting dashboards • Can create custom reports • Uses Salesforce report builder
<ul style="list-style-type: none"> • Will allow more than 5 concurrent admins • No maximum concurrent users • Meets 99.5% uptime • AWS provides redundant fully mirrored backups • 4 hour RPO and 12 hour RTO
<ul style="list-style-type: none"> • Will be able to data map with detail • Can data map 75,000 records • Will do data quality analysis • Successful migrating data • They use ETL – Extract, Transform, Load) for Data Migration approach
<ul style="list-style-type: none"> • Minimal wait time will be less than 30 seconds • Provided in attachment 7
B. Technical Requirements
<ul style="list-style-type: none"> • Listed some of their data centers in other countries • Listed and met all of these IT Policies except keeping data in the US • Will develop a cybersecurity governance and policy framework
2. Staffing
<ul style="list-style-type: none"> • Included in Attachment 8 • Not applicable

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: 3/3/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none">• Provided in attachment 9
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided in Attachment 10

Stage Three- Demonstrations
<ul style="list-style-type: none">• Did not really show how it meets the rfp• Did not talk about their sla• Showed how much work the SOM would need to do ourselves

Stage Four- Cost Proposal
<ul style="list-style-type: none">• Reviewed – missing employee training

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: February 23, March 5, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Salesforce consulting partner with 75 experts • Implemented solutions in multiple states • 17 years of experience in Salesforce, 10 years experience in tracking system services • Examples <ul style="list-style-type: none"> ○ State of Vermont DCF: case and fiscal management system, ~30,000 users, went live in June 2022 and is ongoing ○ State of Indiana DCS: case management system, ~50,000 households, went live in February 2019 and is ongoing ○ Denver Regional Council of Governments: case management system, ~4,000 clients, went live January 2024 and is ongoing
2. Subcontractors
<ul style="list-style-type: none"> • Not applicable
3. Organizational Chart
<ul style="list-style-type: none"> • Provided with no names or descriptions. States details and staffing plan are in appendix F (which we don’t currently have access to)
4. Litigation
<ul style="list-style-type: none"> • None noted
5. Financial Viability
<ul style="list-style-type: none"> • Company appears viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Includes General, Umbrella, Cyber and Professional Liability – valid through September 2024, general liability and workers comp through November 2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: February 23, March 5, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<p>Scope of Services</p> <ul style="list-style-type: none"> • Q – is this SaaS or COTS? It seems like there is a lot of development involved • Verified the solution is browser agnostic • Defined the development and project plan • Specified what existing architecture will be leveraged to produce solution (Salesforce Service Cloud, Community Cloud, MuleSoft, Shield, and Tableau) • Q – has a section that talks about elderly claims – maybe a copy/paste error? <p>Operational Requirements</p> <ul style="list-style-type: none"> • Specified COTS SaaS installation • Can integrate with REDCap via Salesforce SOA, but also offers an alternative approach • Can integrate with Active Directory and has multiple authentication options • Verifies three environments
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs • Bidder identifies additional features beyond the basic requirements and defines those features as well
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs • Bidder identifies additional features beyond the basic requirements and defines those features as well
<ul style="list-style-type: none"> • Allows for multiple administrators and unlimited users depending on edition and licenses. • 99.9% uptime, 4 hour recovery point objective, and 12 hour recovery time objective • Defined data redundancy and backup solutions
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Solution prioritizes reliability and low latency • Application response time less than 30 seconds
<ul style="list-style-type: none"> • 18 month implementation plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: February 23, March 5, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

- Warranty for initial implementation
- Additional modifications or additions will require a structured change management process
- Bidder will perform regular updates (3 software upgrades a year)
- 4 severity levels, escalation plan identified, helpdesk support
- Premier Success plan for support (24 hour phone support, 1 hour response time for critical issues, access to training, connection with groups)

B. Technical Requirements

- Bidder addresses each policy
- Bidder will develop a governance and policy development framework to align with requirements.
- Provided bullet points about each requirement

2. Staffing

- Provided resumes for 7 project staff including Project Manager
- Not applicable
- Provided staffing plan – all staff to be allocated 100% to this project

3. Implementation - Work Plan

- Workplan provided including 6 phases with deliverables, estimated time frames, and which staff would be working on that phase
- Phase 3 is missing
- Timeline is 12 months (provided in visual format)
- Described staff responsibilities
- Will provide weekly status reports in whatever format we chose
- Will track time using DevOps

Stage Three- Demonstrations

- External portal available for self service
- Can interface with SSO
- Can do analytics with Tableau, wouldn't require a Salesforce license
- Multiple mechanisms for data migration
- MuleSoft for integration with unified connectivity
- Dashboard with real time updates, configurable widgets
- Showed making a call out
- Global search
- Showed duplicate record search and how to merge
- Showed how to enter disease report
- Can send a notification when the owner is changed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Brite Systems, Inc.

DATE: February 23, March 5, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

- | |
|--|
| <ul style="list-style-type: none">• Showed audit trail• Showed how to create validation rules (no future dates)• Showed report builder module with optional subscriptions• Showed how to bulk upload or update data |
|--|

Stage Four- Cost Proposal
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Conduent Public Health Solutions, Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert f. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDTCP

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Will require submittal of Vendor Code Application if awarded. • I – Not registered in Maine, however, will comply with all registration requirements. • P – In business for over 22 years. • P – Experience with multiple government organizations. • P – Experience with integration with REDcap. • P - Detailed Capabilities descriptions. • P – Project examples indicate familiarity with RFP requirements at a general level.
2. Subcontractors
<ul style="list-style-type: none"> • Infinite Computer Solutions – Rockville Maryland – 15 years’ experience with Conduent
3. Organizational Chart
<ul style="list-style-type: none"> • High-level organizational chart with named project leads
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • I – Submitted Securities and Exchange Commission (SEC) form 10-K for parent company Conduent Incorporated (Nasdaq: CNDT). • N - Parent company has sustained losses in previous years.
6. Certificate of Insurance
<ul style="list-style-type: none"> • P – Provided at parent company level. • I – Split between 3 insurers (not an issue).

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Conduent Public Health Solutions, Inc.

DATE: 2/21/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Implementing Maven since 2003 • Experience working with State of Maine supporting EBT program since 2002 • 22 Years experience providing their solution • Global enterprise • 24 public health jurisdictions • Maven can work out of the box, scalable at no extra cost/
2. Subcontractors
<ul style="list-style-type: none"> • Use one subcontractor Infinite Computer Solutions
3. Organizational Chart
<ul style="list-style-type: none"> • Provided
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • Cannot determine, shows net losses
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Conduent Public Health Solutions, Inc.

DATE: February 23, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 22 years experience • Not registered in Maine but supports Maine’s EBT program • Maven, hosted in Azure • 80 Maven professionals • Project examples <ul style="list-style-type: none"> ○ Hawaii DOH: disease surveillance system, started June 2011, ongoing ○ Tasmania DOH: disease surveillance system, started February 2021, ongoing ○ United Kingdom Health Security Agency: disease surveillance system, started September 2021, ongoing
2. Subcontractors
<ul style="list-style-type: none"> • 1 subcontractor identified: Infinite Computer Solutions
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • None noted
5. Financial Viability
<ul style="list-style-type: none"> • Provided 2021 and 2022 Annual Report. Difficult to find viability information
6. Certificate of Insurance
<ul style="list-style-type: none"> • Property insurance – valid through 1/1/2025 • Professional Liability insurance – valid through 6/1/2024 • General liability and workers comp – valid through 1/1/2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: DECISIONS, LLC

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Will require submittal of Vendor Code Application if awarded. • I – Provider of technology and implementation partner. • P – In business for over 12 years. • N – POCs for projects were not provided iaw RFP requirements. • N – Projects not dated • N – Vague project descriptions
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • N – insufficient detail
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • N – Balance statements not provided iaw RFP requirements. • N – Income statements not provided. iaw RFP requirements.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: DECISIONS, LLC

DATE: 2/21/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provider since 2010 but didn’t specify what • No real info about company provided • Projects do not really list any info
2. Subcontractors
<ul style="list-style-type: none"> • None listed
3. Organizational Chart
<ul style="list-style-type: none"> • None provided
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • None provided
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: DECISIONS, LLC

DATE: February 23, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • No code configurable SaaS solutions since 2010 • Have healthcare experience • Both provider of the technology and implementation partner • Project examples <ul style="list-style-type: none"> ○ BeneCard – call center project including tracking and management, no dates provided ○ Australian Department of Agriculture – workflow and rule engine, no dates provided ○ Arizona DOT – Price and eligibility calculations, no dates provided
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> •
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • Memo of Health provided, no financial records
6. Certificate of Insurance
<ul style="list-style-type: none"> • General liability through 7/2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I – Incorrect VC# provided – Should be VC1000023678. • Q – wishes to deviate from standard Terms and Conditions as was done for contract OMS-24-206. • P – 50 years of experience including 15 years with the State of Maine. • P – Experience with multiple government organizations. • P – Project examples indicate familiarity with RFP requirements at a general level. One example, for the Commonwealth of Pennsylvania, appears to be similar to the RFP requirements,
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • High-level organization chart provided with specified Team Leads, additional details in Appendix F
4. Litigation
<ul style="list-style-type: none"> • N – Acknowledged litigation but did not provide details
5. Financial Viability
<ul style="list-style-type: none"> • I - Consolidated balance sheet and Profit/Loss statement provided. • P – Financially viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • P – Provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<p>1. <u>System Capabilities:</u></p> <ul style="list-style-type: none">a. Browser-agnostic, including Chrome, Firefox, Edge, and Safari.<ul style="list-style-type: none">i. COTS-SaaS softwareb. Integration<ul style="list-style-type: none">i. Integrated with the existing local REDCap orii. N - did not Propose an alternate, equivalent solution to REDCap.c. Will comply with the MaineIT Azure Enterprise Application Onboarding requirements.d. Includes three (3) environments:<ul style="list-style-type: none">i. Development.ii. User Production Testing; andiii. Live Production.
<p>2. <u>Data Quality:</u></p> <ul style="list-style-type: none">a. Create rules for field entries, including:<ul style="list-style-type: none">i. Field validation using the Validation Rule feature of Azure as determined by the Department.ii. Will use ESRI's ArcGIS to automatically map to Maine's countiesiii. Standard content validation using the Validation Rule feature of Azure as determined by the Department.iv. Spell check capabilities including notes.v. Date verification by date range.vi. Out-of-the-box duplication rules.b. Ability to determine what email the consult is sent to depending on the topic.c. Attachment of files to a consult case by users built-in..
<p>3. <u>Usability:</u></p> <ul style="list-style-type: none">a. Search capabilities, including:<ul style="list-style-type: none">i. Met the Requirements.ii. Met the Requirements.iii. Met the Requirements.b. Auditing, including ability to:<ul style="list-style-type: none">i. Met the Requirements.ii. Met the Requirements.iii. Met the Requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

<ul style="list-style-type: none">c. Will have autofill options, response templates, and canned notes.d. Email:<ul style="list-style-type: none">i. Will provide electronic delivery to disease.reporting@maine.gov.ii. Automated receipt email.iii. Consult assignment by Email to Caseiv. Met the Requirements.v. Met the Requirements.e. Workflow design, including:<ul style="list-style-type: none">i. Met the Requirements.ii. Met the Requirements.iii. Met the Requirements.iv. Met the Requirements.v. Met the Requirements.vi. Met the Requirements.vii. A consult closure button for final resolution N - Not Specified.f. History log, including:<ul style="list-style-type: none">i. Met the Requirements.ii. Met the Requirements.iii. Met the Requirements.g. Administration, including administrator ability to:<ul style="list-style-type: none">i. Met the Requirements.ii. Met the Requirements.iii. Activate/inactivate lookup field.<ul style="list-style-type: none">(1) Met the Requirements.(2) Met the Requirements.
<p>4. Reporting:</p> <ul style="list-style-type: none">a. Reporting dashboards:<ul style="list-style-type: none">i. Met the Requirements.ii. Met the Requirements.iii. Met the Requirements.iv. Met the Requirements.v. Year-to-year trends.vi. Met the Requirements.b. Met the Requirements including Excel formats.c. Met the Requirements.
<p>Product Management Administration:</p> <ul style="list-style-type: none">a. No limit to the number of concurrent administrators.b. Up to one hundred 150K concurrent users Initially 10 Salesforce ServiceCloud and 90 Salesforce Base Platform Licenses.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

<ul style="list-style-type: none"> c. Proposes ninety-nine point five percent (99.5%) uptime in a calendar month. d. Multiple backups during the day. e. 4-hour recovery point objective (RPO) and 12-hour recovery time objective (RTO).
<p>6. <u>Data Conversion:</u></p> <ul style="list-style-type: none"> a. 3 major checks <ul style="list-style-type: none"> i. Missing data Analysis ii. Frequency Distribution Analysis iii. Data Integrity Checks. b. Will use the Salesforce Data Import Wizard and Data Loader c. 4-step process <ul style="list-style-type: none"> i. Segmentation ii. Testing iii. Quality Assurance iv. Refinement d. 3-step process <ul style="list-style-type: none"> i. Field Mapping Collaboration ii. Data Cleanup iii. Testing in a controlled environment. .
<p>7. <u>Performance Metrics:</u></p> <ul style="list-style-type: none"> a. Met the requirements. b. Not specified
<p>8. <u>Support, Administration, and Maintenance</u></p> <ul style="list-style-type: none"> a. Four (4) person Maintenance and Operations Team, Salesforce upgrades 3 times per year, Security scans throughout the year b. Five Service Level Agreements; Response Times, Resolution Times, System Uptime, Scheduled Maintenance, and Reports and Communication.
<p>B. <u>Technical Requirements</u></p>
<p>1. Specific mention of the suite of MaineIT Policies and Standards not included but has worked with the policies under three (3) programs</p>
<p>2. Will achieve the NIST 800-53 Rev 5 for security and privacy.</p> <ul style="list-style-type: none"> a. Physical and Environmental Protection; FedRAMP Moderate certified (mid level). b. Awareness and Training; annual security and privacy training . c. Planning; NIST 800-53 Rev 5 updated annually. d. Audit and Accountability; All events will be audited. e. Assessment, Authorization, and Monitoring; Annual SOC 2 Type 2 audit report.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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|--|
| <ul style="list-style-type: none">f. Personnel Security; Industry standard practices.g. PII Processing and Transparency; Encryption, access controls and rules.h. Contingency Planning; Poorly defined.i. Identification and Authentication; Integration with Maine's Azure AD.j. Incident Response; Met the requirements.k. System and Communications Protection; Encryption of sensitive data at Transport Layer Security 1.2 or higher (1.3 may be available).l. Maintenance; Limited details.m. Media Protection; and - External media prohibitedn. Supply Chain Risk Management – Integral with Salesforce. |
|--|

2. Staffing

- | |
|--|
| <ul style="list-style-type: none">a. Position titles and job descriptions, including qualifications, provided.b. Not Applicable.c. Met the requirements. |
|--|

3. Implementation - Work Plan

- | |
|--|
| <ul style="list-style-type: none">a. Provide a realistic work plan<ul style="list-style-type: none">i. Met the requirements.ii. Adequately described.iii. No subcontractors will be used |
|--|

Stage Three- Demonstrations

- | |
|--|
| <ul style="list-style-type: none">• The demonstration was Maine focused, not a generic presentation.• Very detailed.• Fully met the requirements of the RFP. |
|--|

Stage Four- Cost Proposal

- | |
|---|
| <ul style="list-style-type: none">• Higher cost with excellent backup |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 3/5/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Multiple large disease surveillance projects• 45 years experience across 40+ States• Been established for 175 years• Experience working with the State of Maine for over 15 years• Hand picked team for this project• Number 1 Leader for Salesforce and SaaS/PaaS no code low code platforms• 13000+ Sales force specialists
2. Subcontractors
<ul style="list-style-type: none">• None will be used
3. Organizational Chart
<ul style="list-style-type: none">• Provided
4. Litigation
<ul style="list-style-type: none">• Said none pertain to project
5. Financial Viability
<ul style="list-style-type: none">• Really didn’t provide statements but they are financially viable
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 3/5/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> Using COTS SaaS SalesForce Hosted in AWS GovCloud Includes 3 environments plus some partial copy sandboxes
<ul style="list-style-type: none"> Meets requirements Out of the box deduplication Built in feature to attach files
<ul style="list-style-type: none"> Meets all requirements in detail
<ul style="list-style-type: none"> Meets all requirements in detail
<ul style="list-style-type: none"> No limit on administrators Can scale out rapidly – can handle up to 150k users Meets all other requirements
<ul style="list-style-type: none"> Comprehensive data profiling phase Utilizes salesforce data import wizard Strong collaboration with admins to data map
<ul style="list-style-type: none"> Salesforce uses load balancing Horizontal scaling for screen loading times
<ul style="list-style-type: none"> Provided a full SLA plan – outlined support Called attachment 7, not really an attachment as requested
B. Technical Requirements
<ul style="list-style-type: none"> Will meet all of Maine IT's policies
<ul style="list-style-type: none"> System is built on NIST 800-53 Rev 5 baseline FedRAMP moderate certified Soc 2 Type 2 Meets all requirements listed
2. Staffing
<ul style="list-style-type: none"> Included
<ul style="list-style-type: none"> Not applicable
<ul style="list-style-type: none"> Provided a staffing plan Didn't provide time in hours
3. Implementation - Work Plan
<ul style="list-style-type: none"> Provided work plan and chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 3/5/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Stage Three- Demonstrations

- Nice looking GUI
- Completely customizable
- Opens up new tabs so you don't lose your initial screen
- Can search even as non supervisor based on their roles
- Can set permissions at a granular level
- New mandate to not track new callers
- You can customize, remove fields but they remain in the tables
- They can do the back end work as well, M&O team

Stage Four- Cost Proposal

- Reviewed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2-23-2024, 3-5-2024, 3-28-2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Providing services for 175 years, over 20,000 professionals • Experience working in Maine for 15+ years (provided three examples) • Public health experience in 47 states • Implemented similar solutions in 9 other states and US CDC • GovConnect, built on Salesforce • Largest integrator of Salesforce solutions in government • Project examples <ul style="list-style-type: none"> ○ PA DOH contact tracing: Consult tracking and investigation system, also configured to handle data collection on calls, Sept 2020-Dec 2022 ○ Michigan STI/HIV: HIV/STI program comprehensive product, manages incoming request and questions. Feb 2021 to present ○ New Hampshire Vaccine management system: registration and schedule, call center operations, integrates with IIS. Dec 2020-July 2022
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Provided org chart
4. Litigation
<ul style="list-style-type: none"> • Did not provide
5. Financial Viability
<ul style="list-style-type: none"> • Provided a summary page
6. Certificate of Insurance
<ul style="list-style-type: none"> • General liability and workers comp valid through 6/2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2-23-2024, 3-5-2024, 3-28-2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

- | |
|---|
| <ul style="list-style-type: none">• Professional liability valid through 6/2024 |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2-23-2024, 3-5-2024, 3-28-2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<p>Scope of Services</p> <ul style="list-style-type: none"> • Defines scope, acknowledges key capacities, and identifies expected outcomes • Provides high level system architecture (GovConnect CTS) and defines project management approach (leveraging Azure DevOps) <p>Operational Requirements</p> <ul style="list-style-type: none"> • Specified COTS SaaS installation • Can integrate with REDCap • Can integrate with Active Directory • Verifies three environments
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs • Bidder identifies additional features beyond the basic requirements and defines those features as well • Provided Maine specific examples
<ul style="list-style-type: none"> • Allows for multiple administrators and up to 150K users • 99.9% uptime, 4 hour recovery point objective, and 12 hour recovery time objective • Identified that there are data redundancy and backup solutions
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs • Provides extensive details on data conversion process including deployment certification
<ul style="list-style-type: none"> • Utilizes load balancing to ensure minimal latency and short load times
<ul style="list-style-type: none"> • Dedicated Maintenance and Operations teams to provide support • Monthly bug fixes and minor configuration changes • Upgrade system 3 times a year • 4 categories of response with resolution times from a few hours to 7 business days

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2-23-2024, 3-5-2024, 3-28-2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

<ul style="list-style-type: none"> Planned scheduled maintenance during off-peak hours
B. Technical Requirements
<ul style="list-style-type: none"> History of working with Maine IT on other products – familiarity with Maine requirements Provided Cyber Risk Framework, built on NIST 800-53 baseline Will adapt to Maine specific requirements as necessary
<ul style="list-style-type: none"> Built on baseline of NIST 800-53 Will build a security plan Provided details for each requirement
2. Staffing
<ul style="list-style-type: none"> Procurement for staff is ongoing Provided staffing Org Chart with management team identified Provided titles and job descriptions for Management team and Implementation Team
<ul style="list-style-type: none"> Not applicable
<ul style="list-style-type: none"> Provides basic resumes for leadership team Provides basic time allocation (part time vs full time) for each team member
3. Implementation - Work Plan
<ul style="list-style-type: none"> Provides timeline with 4 month go live proposal Describes each step and identifies key staff and estimated time frame

Stage Three- Demonstrations
<ul style="list-style-type: none"> Consult Intake and Follow up <ul style="list-style-type: none"> Landing page has a dashboard Can search for previous consults Opens up new tabs (to make working on multiple consults easier) County prepopulates based off city Intake can assign consults from entry screen Pop-up option for disease report intake Includes data validation, required fields, and automated rules to pre-populate fields Multiple options to be able to customize intake process One person can't have multiple roles at the same time (consult staff cannot access intake form in demo version) Omni-Channel – allows staff to show when they are available Can upload document Has history log within each consult Call Center Management

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Deloitte Consulting LLP

DATE: 2-23-2024, 3-5-2024, 3-28-2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

- Robust search capabilities (can be enable or disabled by role)
- Priority can be determine by intake staff or by built in rules
- Can define and create reports, save them and share with others
- Has standard built in reports
- Can subscribe to reports
- System Administration
 - System Admin can adjust fields, add new users, assign roles
 - Changes can be made in test and then pushed to production
 - Will connect with active directory and SSO
- Technical and support approach
 - Salesforce configuration experts will be available for workflow review/changes etc.
 - Highly adaptable platform that is updated quarterly
 - All technical requirements are met out of the box, and platform stays current while specifications change
- Salesfoce data loader to analyze existing data, map it to new fields, create .csv format, load into new system
- Deloitte brings additional experience on top of industry standards to support the cyber risk framework. Exceeds market standards
- Dedicated maintenance and operations team
 - System upgrades
 - Monitoring and defect resolution
 - Minor configurations
- Consider the user first and find technology to meet the needs
- Ability to expand for additional functionality

Stage Four- Cost Proposal

-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Eceptionist, Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP)

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Will require submittal of Vendor Code Application if awarded. • P – In business for over 20 years. • P – Experience with multiple government organizations.
2. Subcontractors
<ul style="list-style-type: none"> • Public Consulting Group
3. Organizational Chart
<ul style="list-style-type: none"> • High-level organization chart provided with management positions identified
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • N – Balance sheets not provided iaw RFP requirements. • N – Income (Profit/Loss) statements not provided iaw RFP Requirements
6. Certificate of Insurance
<ul style="list-style-type: none"> • P - Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Eceptionist, Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP)

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<p>1. <u>System Capabilities:</u></p> <ul style="list-style-type: none"> a. the browser is agnostic, Edge, Chrome, and Safari have full compatibility and Firefox is in progress. <ul style="list-style-type: none"> i. SaaS application. ii. Bidder-specific application, not COTS. b. Has the ability to capture patient-level confidential data, separate from initial consult information, through: <ul style="list-style-type: none"> i. Will not integrate with REDCap. ii. Proposes an equivalent solution as part of their Bidder-specific application. c. Integrates with MaineIT Active Directory. <ul style="list-style-type: none"> i. Complies with the MaineIT Azure Enterprise Application Onboarding requirements. d. Includes three (3) environments: <ul style="list-style-type: none"> i. Development. ii. Testing; and iii. Production.
<p>2. <u>Data Quality:</u></p> <ul style="list-style-type: none"> a. Rules for field entries: <ul style="list-style-type: none"> i. Met the requirement. ii. Will use zip code to populate the county. iii. Standard content validation. iv. Spell check capabilities- Not mentioned. v. Date verification – Not mentioned. vi. Real-time duplicate records check. b. Assignment rules: <ul style="list-style-type: none"> i. Uncertain if this meets the requirement. c. Met the requirements.
<p>3. <u>Usability:</u></p> <ul style="list-style-type: none"> a. Search capabilities, including: <ul style="list-style-type: none"> i. Met the requirement. ii. Met the requirement. iii. Met the requirement. b. Auditing: Uses JavaScript Object Notation (JSON)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP)

<ul style="list-style-type: none"><ul style="list-style-type: none">i. Implied.ii. Implied.iii. Implied.c. Autofill:<ul style="list-style-type: none">i. Autofill of case notes and templates.d. Email, including:<ul style="list-style-type: none">i. Electronic delivery to disease.reporting@maine.gov. - Not Specified.ii. A receipt email to the person submitting the consult. - Implied.iii. Consult assignment. - Implied.iv. Notifications when a record is updated. - Implied.v. Notification to staff when assigned a consult. - Implied.e. Workflow design, including:<ul style="list-style-type: none">i. Met the requirements.ii. Met the requirements.iii. Met the requirements.iv. Met the requirements.v. Met the requirements.vi. Met the requirements.vii. Met the requirements.f. History log, including:<ul style="list-style-type: none">i. Met the requirements.ii. Met the requirements.iii. Met the requirements.g. Administration:<ul style="list-style-type: none">i. Did not meet the requirements.ii. Did not meet the requirements.iii. Did not meet the requirements.
<p>4. <u>Reporting:</u></p> <ul style="list-style-type: none">a. Reporting dashboards:<ul style="list-style-type: none">i. Library of canned reports.ii. Will provide 5 custom reports.iii. Will provide 1 dashboard report.iv. Can use Microsoft Power BI to enhance reporting.b. Extracted data can be in CSV, Excel, PDF, and Word formats.<ul style="list-style-type: none">i. Can use Microsoft Power BI to enhance reporting. <p>Note: this section appears to have been copied and pasted from a different RFP for ORC (Oregon Racing Commission?).</p>
<p>5. <u>Product Management Administration:</u></p> <ul style="list-style-type: none">a. Did not meet the requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP)

<ul style="list-style-type: none"> b. Can support up to 10,000 users and 500 concurrent users. c. Availability metric of 99.95% over the last 5 years. d. Data backup nightly to ensure maximum data loss cannot exceed twenty-four (24) hours. e. Will have a maximum recovery time of twenty-four (24) hours. Since founding, the Bidder has not had an outage exceeding 2 hours.
<p>6. <u>Data Conversion</u>: Will be part of a nine (9) step process.</p> <ul style="list-style-type: none"> a. Met the requirements. b. Met the requirements. c. Met the requirements. d. Met the requirements.
<p>7. <u>Performance Metrics</u>:</p> <ul style="list-style-type: none"> a. Not defined but implied from data elsewhere. b. Latency requirements range from 50 to 200 milliseconds.
<p>8. <u>Support, Administration, and Maintenance; Not labeled as Attachment 7</u></p> <ul style="list-style-type: none"> a. Bidder has responsibility for infrastructure, IT services, and application performance. b. Tier 2 Service Desk for super users, technical, and support staff. c. Standard Help Desk support from 7 AM to 6 PM CST. d. Optional Help Desk, at extra cost, for critical issues. e. SLAs provided.
<p>B. Technical Requirements</p>
<ul style="list-style-type: none"> • Bidder will comply with the entire suite of MaineIT Policies and Standards with details provided. • Bidder meets the standards for NIST 800-53 Rev 5 with details provided.
<p>2. Staffing</p>
<ul style="list-style-type: none"> a. Provided position titles and job descriptions, including minimum qualifications, for all project staff including the project lead.
<ul style="list-style-type: none"> b. Two (2) staff members, business analysts, will be long term staffers through Public Consulting Group (PCG).
<ul style="list-style-type: none"> c. 2.35 Bidder FTEs and 0.8 CDC FTE
<p>3. Implementation - Work Plan</p>
<ul style="list-style-type: none"> a. Provide a realistic work plan. <ul style="list-style-type: none"> i. Work plan displayed as a table not a timeline. ii. Program development and implementation tasks are detailed to the period it will be performed. The position of who is responsible is not defined. iii. Tasks to be delegated to subcontractors are not defined.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Eceptionist, Inc.

DATE: 3/5/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 20+ years in business • Offers Commercial Off the Shelf software solutions • Will provide a specific team • Have experience in providing complex solutions into a baseline software • Provided 3 projects with some details
2. Subcontractors
<ul style="list-style-type: none"> • Public Consulting Group
3. Organizational Chart
<ul style="list-style-type: none"> • Provided with names
4. Litigation
<ul style="list-style-type: none"> • None Stated
5. Financial Viability
<ul style="list-style-type: none"> • Nothing provided
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Eceptionist, Inc.

DATE: 3/5/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Azure cloud based HIPPA compliant solution • Highly configurable • Replace REDCap with custom built web form • Provided diagram of AD integration • Can provide 3 environments
<ul style="list-style-type: none"> • Meets requirements • Assignment rules based on SSAP • Supports a wide variety of attachments
<ul style="list-style-type: none"> • Flexible searching • Workflow Manager application • Did not address administrator abilities
<ul style="list-style-type: none"> • PowerBI tools to enhance reporting • Built in canned reports to provide these items • Not all reports are flexible to modify layout • Can be exported
<ul style="list-style-type: none"> • Up to 10,000 users and 500 concurrent • Can meet RPO and RTO requests • No limits to sites, specialties or work flows
<ul style="list-style-type: none"> • Has successfully imported up to 500k of records • Listed 9 steps for data importing, analysis
<ul style="list-style-type: none"> • High availability and redundancy • Uses Azure application gateway to load balance incoming traffic • Average response time is .1 second to a 1 second • Included in attachment 7
B. Technical Requirements
<ul style="list-style-type: none"> • Policies align with Maine IT policies • Will comply and meet with all policies
<ul style="list-style-type: none"> • Meets the standards for NIST 800-53 Rev 5 • Research of inappropriate access is a time and materials charge • 99.82% uptime
2. Staffing
<ul style="list-style-type: none"> • Provided Attachment 8

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

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BIDDER NAME: Eceptionist, Inc.

DATE: 3/5/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none">• PCG will lead team?• Provided attachment 9
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided high level plan• Will create a Plan of Operations within 30 days• Did provide duration days

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Eceptionist, Inc.

DATE: February 23, March 6, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 20 years experience • History working with healthcare • EceptionistCX solution (COTS but configurable) • Project examples <ul style="list-style-type: none"> ○ Children’s Hospital of Orange County: referral portal, Nov 2019 to present ○ Telus Health WorksafeBC: provider portal to manage cases and referrals, May 2011 to present ○ Mississippi DOC: case management and referral system, Nov 2022 to present
2. Subcontractors
<ul style="list-style-type: none"> • PCG
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • Did not meet requirements
6. Certificate of Insurance
<ul style="list-style-type: none"> • General, professional and cyber valid through 10/2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Eceptionist, Inc.

DATE: February 23, March 6, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Verifies browser agnostic SaaS solution • Proposed a web based form instead of integrating with REDCap (although integration is possible if necessary) • Supports Azure Active Directory integration • Verifies three environments
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Bidder addresses all requirements except for Administration and describes how they can ensure the solution meets these needs • Some administration activities identified in earlier section about Maine Specific Configurations
<ul style="list-style-type: none"> • Utilizes SSS and PowerBI tools for reporting • Provided sample dashboard • 5 custom reports and 1 dashboard included • Data can be exported
<ul style="list-style-type: none"> • No limit to named users, experience with up to 500 concurrent users • 99.95% uptime over last 5 years • Uses Azure services for back-up and retention • Confirms recovery time under 24 hours (longest time in company history is 2 hours)
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Uses redundant infrastructure and interfaces including load balancing • Average response time of 0.5 seconds
<ul style="list-style-type: none"> • Once operation will transition to Tier 2 Service Support – support available for super users • Help desk solution, self help tools, and online help guide • Support M-F 7AM-7PM CT, 24 hour support for critical issues • Tier 1 service is optional (with additional cost) – support available for all users • 3 severity levels with resolution time from 24 hours to 10 business days • 3-4 minor releases per year with 1 major release every 9-18 months • Has defined release testing process

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Eceptionist, Inc.

DATE: February 23, March 6, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

B. Technical Requirements
<ul style="list-style-type: none">• Internal policies and standards align with MaineIT• Provides summary of system including architecture diagram• Provides description of Azure capabilities
<ul style="list-style-type: none">• Meets NIST 800-53 standards• Provided details for each requirement
2. Staffing
<ul style="list-style-type: none">• Org chart with names and titles• Provides basic resumes for team members
<ul style="list-style-type: none">• PCG will provide technical consulting services• PCG has history of working with Maine Government• PCG will be responsible for application design and solution documents and requirements traceability matrix
<ul style="list-style-type: none">• Provides role and estimated percentage of time• 7 proposed staff, and 5-7 Maine CDC resources
3. Implementation - Work Plan
<ul style="list-style-type: none">• 118 day implementation plan• Provided project timeline table including major tasks• No specific persons responsible• Identified tasks to be lead by PCG

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Elixir Lab USA Inc (d/b/a Cadinality.ai)

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Will require submittal of Vendor Code Application if awarded. • P – In business for over 6 years. • P – Experience with multiple government organizations. • P – Project examples indicate familiarity with RFP requirements at a general level. All three project examples discussed childcare support
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • High-level organization chart provided with further details in Appendix F
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Dun and Bradstreet report for 2023, Audit reports with balance sheets, etc. for 2022 and 2021. • Appears financially stable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Elixir Lab USA Inc (d/b/a Cadinality.ai)

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<p>1. <u>System Capabilities:</u></p> <ul style="list-style-type: none"> a. Browser agnostic, SaaS application <ul style="list-style-type: none"> i. Not COTS, Bidder developed software. b. Can capture patient-level confidential data <ul style="list-style-type: none"> i. Integrates with REDCap ii. An alternate, equivalent solution is provided in Appendix H. c. Integrates with MaineIT Active Directory. <ul style="list-style-type: none"> i. Complies with the MaineIT Azure Enterprise Application Onboarding requirements. d. Complies with MaineIT Azure Application Onboarding requirements e. Includes three (3) environments: <ul style="list-style-type: none"> i. Development. ii. Quality Assurance. iii. User Acceptance Testing. iv. Pre-production. v. Live Production.
<p>2. <u>Data Quality:</u></p> <ul style="list-style-type: none"> a. Rules for field entries: <ul style="list-style-type: none"> i. Met the requirements. ii. Met the requirements. iii. Met the requirements. iv. Met the requirements. v. Met the requirements. vi. Met the requirements. b. Rules for assignments: <ul style="list-style-type: none"> i. Met the requirements. ii. Met the requirements.
<p>3. <u>Usability:</u></p> <ul style="list-style-type: none"> a. Search capabilities: <ul style="list-style-type: none"> i. Met the requirements. ii. Met the requirements. iii. Met the requirements. b. Auditing: <ul style="list-style-type: none"> i. Met the requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

<ul style="list-style-type: none"><ul style="list-style-type: none">ii. Met the requirements.iii. Met the requirements.c. Autofill options:<ul style="list-style-type: none">i. Met the requirements.d. Email:<ul style="list-style-type: none">i. Not Specified.ii. Met the requirements.iii. Met the requirements.iv. Met the requirements.v. Met the requirements.e. Workflow design:<ul style="list-style-type: none">i. Met the requirements.ii. Met the requirements.iii. Met the requirements.iv. Met the requirements.v. Met the requirements.vi. Not Specified.vii. Met the requirements.f. History log:<ul style="list-style-type: none">i. Met the requirements.ii. Met the requirements.iii. Met the requirements.g. Administration:<ul style="list-style-type: none">i. Met the requirements.ii. Met the requirements.(1) Met the requirements?iii. Met the requirements.(1) Met the requirements.(2) Met the requirements.
<p>4. <u>Reporting:</u></p> <ul style="list-style-type: none">a. Met the requirements:<ul style="list-style-type: none">i. Met the requirements.ii. Met the requirements.iii. Met the requirements.iv. Met the requirements.v. Met the requirements.vi. Met the requirements.b. Met the requirements.c. Met the requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS/MCDCP

<p>5. <u>Product Management Administration:</u> a. More than five (5) concurrent administrators. b. Met the requirements. c. Met the requirements. d. Maximum data loss cannot exceed two (2) hours. e. Recovery time objective of four (4) hours.</p>
<p>6. <u>Data Conversion:</u> a. Met the requirements. b. Met the requirements. c. Met the requirements. d. Met the requirements.</p>
<p>7. <u>Performance Metrics:</u> a. Met the requirements. b. Met the requirements.</p>
<p>8. <u>Support, Administration, and Maintenance</u> a. Met the requirements. b. Met the requirements – N - FTE level not specified.</p>
<p>B. Technical Requirements</p>
<p>1. N – Not Specified:</p>
<p>2. N – Not Specified:</p>
<p>2. Staffing</p>
<p>a. Met the requirements.</p>
<p>b. Not Applicable.</p>
<p>c. Met the requirements.</p>
<p>3. Implementation - Work Plan</p>
<p>a. Met the requirements. i. Met the requirements. ii. Met the requirements. iii. Not Applicable.</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Elixir Lab USA Inc (d/b/a Cadinality.ai)

DATE: 3/6/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Start-up in 2020? No info on start of company except that • COTS solutions adhere to government standards • Uses an AI assistant • Provided 3 projects
2. Subcontractors
<ul style="list-style-type: none"> • None listed
3. Organizational Chart
<ul style="list-style-type: none"> • Provided both Leadership and project org chart
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • Appear to be financially stable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided – it’s expired

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Elixir Lab USA Inc (d/b/a Cadinality.ai)

DATE: 3/6/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Cloud based SaaS system designed low code • Can integrate with AD • Can provide 3 environments – they usually provide 5
<ul style="list-style-type: none"> • Meets requirements • Admins can determine email used • Enterprise Document management system, uses AWS S3
<ul style="list-style-type: none"> • Met requirements • Listed detailed response for all items
<ul style="list-style-type: none"> • Can integrate with State’s Tableau • Can generate custom reports and queries • Uses Role Based Access Control to provide data security
<ul style="list-style-type: none"> • Built in admin console • Can handle more than 5 admins • Can rapidly scale up to 1000 users or more • 99.5% uptime or higher • No more than 2 hours of data loss • RTO of 4 hours
<ul style="list-style-type: none"> • Data mapping between source and target • Integrity/sanity verifications • Will use UAT to ensure data has been loaded correctly • UI smoke testing
<ul style="list-style-type: none"> • With load balancing the solution has high reliability and can accommodate over 100 concurrent users • Using server side caching and optimized code load times should be less than 1 second
<ul style="list-style-type: none"> • Provided in Attachment 7
B. Technical Requirements
<ul style="list-style-type: none"> • Ensures compliance with all of Maine IT Policies • Can meet NIST 800-53 Rev 5 requirements • Meet requirements
2. Staffing
<ul style="list-style-type: none"> • Provided, minimal job descriptions

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Elixir Lab USA Inc (d/b/a Cadinality.ai)

DATE: 3/6/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none">• Will not use – not applicable
<ul style="list-style-type: none">• provided
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided• No subcontractors

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23, March 6, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Started in 2017 • Healthcare and government experience • Worked with 4 other states • EmpowerHealth Consulting and Tracking System (EH.CTS) – a low code platform • Project examples <ul style="list-style-type: none"> ○ MD DHS: case management and financial management system (CPS, foster, independent living), Feb 2018-Aug 2020 (still supporting) ○ IN DCS: eligibility and finance modules for child services, July 2020 to present ○ GA DHS: Foster care system self-serve portal, mobile access, and financial management, June 2023 to present
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Company appears viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • General, Umbrella, Tech and Cyber – valid through 2/2024 (technically expired prior to due date)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23, March 6, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

Stage Two- Proposed Services
Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Product Operational Requirements
<ul style="list-style-type: none"> • Browser agnostic SaaS solution • Can integrate with Active Directory • Can integrate with REDCap or create an online form equivalent • Normally uses 5 environments, but can conform to 3
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs • Can integrate with Maine's Tableau Server
<ul style="list-style-type: none"> • Allows more than 5 administrators • Can handle concurrent users with flexible scalability • 99.5% uptime utilizing AWS architecture • RPO of 2 hours, RTO of 4 hours
<ul style="list-style-type: none"> • Bidder addresses all requirements and describes how they can ensure the solution meets these needs • Provide data conversion process map
<ul style="list-style-type: none"> • Provides assurances they can meet the requirements
<ul style="list-style-type: none"> • 12 months maintenance and operations support post implementation • Support will transition to Maine with escalated support (level 2 and 3) provided by bidder • Will create a searchable Knowledge Base for Level 1 Help Desk users • Proposed SLA's included (4 severity levels) • No information on routine patches/upgrades
B. Technical Requirements
<ul style="list-style-type: none"> • Acknowledges requirements and states commitment to work closely with IT to ensure compliance
<ul style="list-style-type: none"> • Cloud first solution using AWS which natively addresses many of these requirements • Provided details for each requirement
2. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Elixir Lab USA Inc (d/b/a Cardinality.ai)

DATE: February 23, March 6, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

<ul style="list-style-type: none">• Provided job description without minimum qualifications
<ul style="list-style-type: none">• Not applicable
<ul style="list-style-type: none">• Provided position titles and estimated time allocation• Provided Org chart for project delivery
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided 5 phase plan• 6 months go live timeframe• Provided timeline chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Spruce Technology Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Will require submittal of Vendor Code Application if awarded. • P – In business for over 17 years. • P – Experience with multiple government organizations esp. in New York City. • P – Project examples indicate familiarity with RFP requirements at a general level.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • High-level organization chart provided with named VP level individuals
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Balance sheets and Income (Profit/Loss) statements provided. • Appears financially stable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Spruce Technology Inc.

DATE: 2/22/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Established in 2006, Located in NJ • In multiple countries • Provide end to end delivery • A staff augmentation company? • Provided 3 projects
2. Subcontractors
<ul style="list-style-type: none"> • None listed
3. Organizational Chart
<ul style="list-style-type: none"> • Provided
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • Provided financial statements -appear viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Spruce Technology Inc.

DATE: February 23, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Established in 2006 • Experience in healthcare and government • Project examples <ul style="list-style-type: none"> ○ NYC DOE: intake and case management for COVID in schools, staffed call center and developed tracking portal. Aug 2020-Aug 2023 ○ NYC DOHMH: Three separate projects including portals, partner relationships, health education promotion. Sept 2019-June 2020 ○ NYC Department of Buildings: Self service online tool to submit applications, make payments, schedule etc. Converted paper system to online portal with multiple modules. Sept 2016 to present
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Company appears viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • General, contractual, umbrella, workers comp, technology, and crime – valid through 5/2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Tech Mahindra Americas Inc.

DATE: 2/22/2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDTCP

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • P – Existing valid vendor code number. • P – In business for over 15 years. • P – Experience with multiple government organizations. • P - CMMI Level 5 Certification (Capability Maturity Model Integration) – indicates a focus on optimizing business processes through adopting incremental and innovative technological improvements. • P – ISO 27701 certification – Privacy Information Management System for data privacy requirements. • P – ISO 22301 DAKKS 2021 certification – Business Continuity Management System to protect against, reduce the likelihood of, and ensure recovery from disruptive incidents • P – ISO 27001 DAKKS 2021 certification – Information security management system or risk management, cyber-resilience and operational excellence.
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • High-level organization chart provided with names.
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Information provided at corporate level. • Appears financially stable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Tech Mahindra Americas Inc.

DATE: 2/22/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 15+ years serving public sector • Salesforce Summit consulting partner • Mid-size and large public sector provider • Sales Force solution says meets 100% of requirements • Provided 3 projects
2. Subcontractors
<ul style="list-style-type: none"> • None listed
3. Organizational Chart
<ul style="list-style-type: none"> • Provided
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • Provided, appear financially viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401003

RFP TITLE: Consult Tracking System

BIDDER NAME: Tech Mahindra Americas Inc.

DATE: February 23, 2024

EVALUATOR NAME: Sara Robinson

EVALUATOR DEPARTMENT: Maine DHHS/DDS/ID Epi Program

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

Individual Evaluator Comments:

Stage One- Qualifications and Experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 141,000 professionals and 1120+ clients • Has a public sector practice with government experience and more than 15 years experience • Multiple platforms including Salesforce, Dynamics, Azure, AWS, Pega etc. • Project examples <ul style="list-style-type: none"> ○ State of Vermont, Department of Liquor and Lottery: licensing, permitting, inspection, and enforcement system. Currently in UAT and on track to go live in Aug 2022 (typo? Should it be 2024?) ○ NH Department of Safety: Driver licensing system. Oct 2017 to present ○ VT Cannabis Control Board: Inventory ant tracking system. Sept 2022 to present
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • Company appears viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided but expired in 2022



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202401003
RFP TITLE: Consult Tracking System

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

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

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

I understand 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.

DocuSigned by:

Robert Chicoria

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Signature

Feb-21-2024

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202401003
RFP TITLE: Consult Tracking System**

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

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

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

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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.

DocuSigned by:

Melanie Messina

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Signature

Feb-21-2024

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202401003
RFP TITLE: Consult Tracking System**

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

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

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

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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.

DocuSigned by:

Sara Robinson

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Signature

Feb-21-2024

Date