Example: Request for Proposal (RFP) Template

(Addendum to the "Practical Framework for Evaluating Case Management Systems" Resource)

The following template is intended to provide guidance on crafting an effective RFP as it pertains to implementing or modifying a Case Management System (CMS) in the Vocational Rehabilitation (VR) program. Understanding the rules and requirements of a specific State VR Agency (SVRA) is crucial before drafting an RFP. As this template is not exhaustive, SVRAs should tailor the language and structure of the RFP according to their respective needs.

When drafting the RFP, focus on exploring new functionalities and expansion opportunities rather than simply restating the features of the current system.

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I. Scope and Objectives

A. Overview and Background

[SVRA Name] is a State government agency dedicated to providing VR services to support individuals with disabilities. The primary goal is to empower individuals to achieve their employment goals. The VR program offers a range of services, including assessment and diagnostic/treatments, VR Counseling and Guidance, training, employment-related services, Pre-Employment Transition Services (Pre-ETS) that can be provided to potentially eligible students with disabilities as well as those students who have applied for and been determined eligible for services that are listed on an approved Individualized Plan for Employment (IPE), referrals to partner programs, and support for programs such as the Older Individuals who are Blind (OIB) and Business Enterprise Program (BEP).

B. Definitions: To ensure a mutual understanding, the following definitions apply:

1. **Applicant**: Individual who has applied for VR services and are awaiting VR eligibility determination.
2. **Exiter**: Participant who exits the program. In the context of participant, this is when the individual’s case is closed in accordance with VR program requirements, whether "successful" or "unsuccessful."
3. **Participant**: Individual who has been determined eligible and has received VR services in an approved IPE.
4. **Post-Exit**: Participant who exits the program and requires additional reporting of performance measures to track and report post-exit data.
5. **Eligible Individual**: Individual who has applied for VR Services and has been determined eligible for VR services.
6. **Reportable Individual**: Individual who has applied for VR Services but has not yet met the definition of “participant” and/or are students with disabilities receiving Pre-ETS prior to applying for and being determined eligible for VR services.
7. **Referral**: Individual who has been referred to the program and is awaiting an intake application meeting.
8. **Student with a Disability**: Individual with a disability in a secondary, postsecondary, or other recognized education program whose age range falls within the State’s IDEA age range under section 614(d)(1)(A)(i)(VIII); and
    a. Is eligible for, and receiving, special education or related services under Part B of the Individuals with Disabilities Education Act (20 U.S.C. 1411 et seq.); or
    b. Is a student who is an individual with a disability, for purposes of section 504.

C. Scope of Work

The scope of this project is to develop a configurable statewide case management system that will effectively capture and manage individual case information for the VR program. The system should be flexible and adaptable to meet the unique needs of the State while ensuring compliance with regulatory requirements.

D. Current System and Supported Systems/Technologies

Currently, the SVRA operates on *[Insert Information here. Example: A legacy case]* case management system that has become outdated and lacks the necessary functionality to support evolving needs. We require a modern, efficient, and user-friendly system that integrates with the existing infrastructure and supports seamless case management and reporting, as well as data exchange with partner systems.

E. Programs

The SVRA manages various programs, including the following:

1. **Vocational Rehabilitation (VR) Services program, including the Supported Employment (SE) Services program**: Provides a range of services to support individuals with disabilities in achieving their employment goals.
2. **Older Individuals who are Blind (OIB)**: Assists individuals who are blind or visually impaired in gaining the skills and resources necessary for independent living and employment.
3. **Randolph-Sheppard program, also known as the Business Enterprise Program (BEP) under the Randolph-Sheppard Act**: Supports individuals who are blind or visually impaired in establishing and operating successful businesses.
4. **Independent Living Services for Older Individuals Who Are Blind (IL-OIB) Program:** Provides support services for individuals age 55 or older whose severe visual impairment makes competitive employment difficult to obtain but for whom independent living goals are feasible.

F. Current Staff Overview and Stakeholders

The SVRA has a dedicated team of professionals in multiple area offices. The case management system will serve administrators, counselors, supervisors, regional managers, and support staff, with an estimated *[number of users]* users accessing the system. Stakeholders also include partner organizations, service providers, and individuals receiving services.

G. Glossary of Acronyms *[Please note: The list of acronyms below is not extensive. SVRAs should identify all applicable acronyms.]*

To aid understanding, a glossary of acronyms is provided:

1. **BEP**: Business Enterprise Program
2. **OIB**: Older Individuals Who are Blind

3. **Pre-ETS**: Pre-Employment Transition Services
4. **VR**: Vocational Rehabilitation

II. Project Phases

A. Planning and Analysis

1. **Project management methodology**: The vendor should demonstrate their proficiency in utilizing Project Management Body of Knowledge (PMBOK) methodology to ensure effective project management and adherence to industry best practices.
2. **Technology standards**: The proposed solution should align with the technology standards and guidelines set by the State's Office of Technology. *[Insert link, attachment for reference, or standard language of available documentation.]*
3. **Onsite presence**: The vendor should specify the required onsite presence during the planning and analysis phase, including the frequency and duration of onsite visits.
    a. Onsite visits should be conducted at least once every two months for a duration of two consecutive business days.
    b. The purpose of these onsite visits is to facilitate collaboration, gather project requirements, conduct meetings, and align with stakeholders.
    c. The specific dates for each onsite visit will be mutually agreed upon between the vendor and the *[SVRA]*.
    d. The vendor is responsible for all travel expenses associated with the onsite visits, including transportation, accommodation, and meals.
    e. In exceptional circumstances where onsite visits are not feasible or necessary, alternative arrangements for virtual meetings and remote collaboration should be established and agreed upon by both parties.
4. **Project work plan**: The vendor should develop a comprehensive project work plan that outlines the tasks, timelines, milestones, and resources required for successful project execution. The work plan should follow industry best practices and be tailored to the specific needs of the organization.
5. **Risk management**: The vendor should demonstrate their expertise in risk management and provide a detailed plan for identifying, assessing, mitigating, and monitoring risks throughout the project lifecycle.
6. **System gap analysis**: The vendor should conduct a thorough analysis of the existing systems and interfaces to identify any gaps or areas for improvement. This analysis should guide the development of the proposed solution and ensure seamless integration with existing systems.
7. **Requirement development for customizations**: The vendor should engage stakeholders to gather and document detailed requirements for any customizations

or enhancements to the system. The requirements should be clearly defined, measurable, and aligned with the organization's needs and objectives.

8. **Data conversion analysis**: The vendor should assess the existing data structure, formats, and sources to determine the feasibility and approach for data conversion. This analysis should address data integrity, mapping, transformation, and validation to ensure a smooth transition to the new system.
9. **Data security**: The proposed solution should meet stringent data security requirements, including data encryption, access controls, user authentication, audit trails, and compliance with relevant data protection regulations. The vendor should provide a comprehensive security plan and demonstrate their experience in safeguarding sensitive protected identifiable information (PII).
10. **Adaptive technology/accessibility**: The proposed solution should be designed with adaptive technology and accessibility in mind, ensuring compliance with accessibility standards to accommodate users with disabilities. The vendor should outline their approach to accessibility and provide evidence of prior experience in delivering accessible solutions.
11. **The vendor should adhere to the following requirements throughout the planning and analysis phase**:
    a. <u>Project meeting and reporting</u>: Regular project meetings should be held to discuss progress, address issues, and provide updates. The vendor should submit detailed progress reports documenting milestones, deliverables, and any challenges encountered. The vendor should also indicate the frequency with which these will be provided.
    b. <u>Change control processes</u>: The vendor should establish robust change control processes to manage and document any changes to project scope, requirements, timelines, or resources. Changes should be assessed, approved, and communicated effectively to ensure project alignment.
    c. <u>Deliverable management</u>: The vendor should establish a clear process for managing and tracking project deliverables, ensuring timely submission, quality assurance, and approval from the organization's stakeholders.
    d. <u>Project coordination</u>: The vendor should assign a dedicated project coordinator who will serve as the main point of contact, responsible for coordinating activities, managing communication channels, and facilitating collaboration between the vendor and the organization's team.

Please provide details on how the organization can fulfill the above requirements for the Planning and Analysis phase.

B. Design, Development, and Customization

1. **The proposed system should meet the following design requirements and considerations**:

    a. VR process: The system should support the full VR process, including intake, assessment, planning, goal setting, service provision, and closure. It should accommodate the needs of returning referrals and participants and provide seamless integration between Pre-ETS and VR services.

    b. Fiscal needs: The system should provide functionality for individual, group, and bulk authorizations for purchase, allowing for flexible management of funding sources and tracking of expenses. It should support the use of account codes and provide robust reporting capabilities for financial monitoring and reconciliation.

    c. IPE development and amendments: The system should facilitate the development and management of Individualized Plans for Employment (IPE), allowing for easy customization and updates. It should support the flexibility needed for IPE amendments, ensuring accurate tracking of changes, and maintaining compliance with regulatory requirements.

    d. System enforcements and checks: The system should incorporate built-in checks and enforcement for RSA-911 reporting elements, ensuring that required data points are captured accurately and consistently. It should provide validation mechanisms to prevent errors and support data integrity.

    e. Ease of use: The system should prioritize user-friendly interfaces and intuitive workflows, promoting ease of use. The system should offer features, including autosave for case notes and other data entry fields to prevent data loss and streamline user experience.

    f. Terminology consistency: The system should maintain consistent and standardized terminology throughout, aligning with industry best practices and the specific language used in the VR field. Preferably, the system should support customizable terminology based on State-specific needs, ensuring clarity and accuracy in data representation.

    g. System training: The system should include comprehensive training materials and resources to facilitate user onboarding and ongoing system updates. It should offer accessible training, such as user guides, videos, or modules.

    h. State-specific needs: The system should be configurable to accommodate State-specific requirements, regulations, and policies. It should allow for customization and tailoring to meet the unique needs of the organization and align with the State's VR program guidelines.

2. **The vendor should gather and document the following business requirements**:

    a. Functional requirements: The system should support the core functions and processes of the SVRA's program. The vendor should respond to the attached detailed business requirements indicating if the requirements listed can be met.

    b. Integration requirements: The system should integrate with existing systems and interfaces used by the SVRA, such as fiscal management systems, reporting systems, and communication platforms. The vendor should assess integration needs, identify data exchange points, and propose solutions for seamless integration.

    c. Reporting requirements: The system should comply with the current and historical reporting requirements mandated by the Rehabilitation Service Administration (RSA). The system should capture and store the necessary data elements for reporting purposes, ensuring accurate and timely submission of required reports. The vendor should demonstrate their understanding of RSA reporting requirements and propose a solution that meets those requirements effectively. The system should support standard reports mandated by RSA and allow for custom report generation based on specific program needs. The system should also align and maintain RSA Federal reporting requirements and changes/updates for timely submission.

    d. Data analysis tools: The system should allow for the creation of reports, dashboards, and other data analysis tools for case management, performance monitoring, and other data analysis needs.

Please provide specific information on how the organization can meet the outlined requirements for the Design, Development, and Customization phase mentioned above. Be sure to reference any attachments *[e.g., a business requirements document]* for the response.

C. Testing

1. **The vendor should develop a comprehensive test management plan that outlines the testing strategy, objectives, and approach for the implementation of the system.** The plan should include the following:

    a. Testing objectives: Clearly define the objectives and goals of the testing phase, including functional, performance, security, accessibility, and compatibility testing.

    b. Test scope: Identify the scope of the testing activities, specifying the modules, features, and functionalities that will be tested.

    c. Test schedule: Provide a detailed schedule for each testing phase, including test planning, test execution, defect management, and reporting.

    d. Test resources: Identify the resources required for testing, such as testing tools, test environments, and personnel with relevant expertise.

e. Test deliverables: Specify the expected deliverables from the testing phase, including test plans, test cases, test scripts, and test reports.

f. Test execution approach: Describe the approach for executing test cases, capturing test results, and managing defects.

g. Risk assessment: Conduct a risk assessment for testing activities, identifying potential risks and mitigation strategies.

2. **Compatibility with assistive technology**: The system should be compatible with a range of assistive technologies commonly used by individuals with disabilities. The vendor should ensure that the system meets accessibility standards (e.g., Web Content Accessibility Guidelines [WCAG]) and performs effectively with screen readers, magnifiers, speech recognition software, and other assistive technologies. Compatibility testing should be conducted to validate the system's accessibility features.

3. **User acceptance testing**: User acceptance testing (UAT) should be performed to ensure that the system meets the requirements and expectations of end-users. The following considerations should be included in the UAT process:

   a. Test scenarios: Develop test scenarios that cover a wide range of user interactions, workflows, and use cases.

   b. UAT environment: Set up a dedicated testing environment that closely resembles the production environment to simulate real-world conditions.

   c. Test data: Prepare test data that accurately represents typical referral and case scenarios.

   d. User roles: Test the system's functionality and usability for different user roles, such as administrators, fiscal staff, support staff, counselors, and managers.

   e. Authentications: Validate the authentication mechanisms, including login, password reset, and role-based access controls.

   f. Workflows: Test the system's workflows, ensuring that they align with the defined processes and facilitate efficient task completion.

   g. Data flows: Verify the accuracy and integrity of data flows within the system, including data entry, retrieval, and updates.

   h. Reporting requirements: Validate the system's reporting capabilities, generating test reports, covering different report types and parameters, and verifying their accuracy, format, and completeness.

   i. Interface requirements: Test the system's interfaces between the system and external systems, validating data exchange and integration.

4. **Test scripts in accordance with design**: The vendor should develop comprehensive test scripts that align with the system's design and requirements.

5. **Customization/Interface testing**: The following customization/interface testing should be considered:

    a. Interfacing Systems Testing: The selected vendor shall demonstrate a comprehensive understanding of interfacing systems and include capability to integrate systems within the CMS. These systems include, but are not limited to, the following: Unemployment Information (UI), State Wage Interexchange System (SWIS), and fiscal system. The proposal must include a detailed plan to assess and address any additional testing needs related to these interface systems. The vendor should provide a clear strategy for ensuring seamless integration and data exchange between the new system and the existing interfacing systems.

    b. Electronic Signature Functionality: The proposed solution must include support for electronic signatures. The vendor shall outline a thorough testing approach to validate the efficiency, security, and reliability of the electronic signature functionality. This should include procedures to verify the authenticity and integrity of electronically signed documents within the system. Compliance with relevant legal and regulatory requirements related to electronic signatures must be addressed in the proposal.

    c. Non-VR Staff Access Testing: The vendor should describe the provisions for non-VR staff access to the system. This may involve access for the Client Assistance Program (CAP) personnel, vendors, or even participants with restricted permissions. The proposal should outline the testing plans to ensure that appropriate security measures are in place to control access rights and permissions. The vendor must demonstrate how sensitive data will be safeguarded and access controls will be enforced effectively.

Please provide a detailed explanation of how the organization can meet the specified requirements during the Testing phase.

D. Data Migration, Implementation, and Training

1. Data Migration

a. Data from the last *[five VR program years]* (e.g., Program year begins July 1 and ends June 30 of the following year) should be migrated into the new system.

b. The vendor should implement a robust data migration process that ensures the successful transfer of data from the existing system to the new system. The migration process should include thorough data validation checks to verify that the migrated data is accurately aligned with the new system's data structure (e.g., disability priority should be calculated correctly from the old system to the new system, ensuring data integrity).

2. **Implementation**

   a. The vendor should provide a detailed implementation plan that outlines the timeline for system deployment. The plan should include milestones, deliverables, and dependencies. The vendor should specify the process of communicating any delays or changes to the agreed timeline and provide a plan for managing the impact of the delay. Furthermore, it is essential the vendor disclose any financial implications associated with delaying the agreed timeline. Additionally, the plan should address the possibility of conducting a pilot phase to test the system's functionality and gather feedback before full-scale deployment.

3. **Training**

   a. The vendor should develop comprehensive training materials to facilitate the effective use of the new system. The training materials should include user manuals, guides, tutorials, and any other resources necessary to train end-users. The responsibility for developing these training materials should be clearly defined, specifying whether the vendor or the client organization will be responsible.

   b. The following training considerations should be addressed:

      - End-users: Provide training sessions tailored to the needs of different user roles within the organization, ensuring that each user understands how to navigate the system and perform their tasks effectively.
      - Train the trainer: Identify key individuals within the organization who will be responsible for training other employees. Provide them with comprehensive training so they can effectively transfer knowledge and skills to their colleagues.
      - Super users: Identify key individuals within the organization who will be responsible for being the first line of support within an office or district. Provide them with comprehensive training so they can effectively perform job duties and help colleagues troubleshoot issues.
      - Helpdesk: Establish a helpdesk or support center training to provide ongoing assistance to users, addressing any questions or issues that may arise during system usage.
      - System administrator: Provide specialized training for system administrators, equipping them with the knowledge and skills needed to manage and maintain the system effectively.
      - System technical support: Ensure that technical support personnel are trained to handle system-related issues promptly and efficiently.

- <u>Fiscal</u>: Include training sessions or resources specifically tailored to the financial aspects of the system, such as budgeting, expense tracking, and reporting.
- <u>Accessibility and assistive technology within the system</u>: Address accessibility training to ensure that users are familiar with assistive technologies and features within the system, promoting inclusivity and usability for individuals with disabilities.

4. **Consideration for ongoing training needs for system changes/updates**

   a. The vendor should outline a plan for addressing ongoing training needs that may arise from system changes or updates. This plan should include provisions for delivering additional training materials, conducting refresher training sessions, or providing online resources to keep users up to date with the latest system features and enhancements.

Please provide a comprehensive explanation of how the organization can fulfill the specified requirements during the Data Migration, Implementation, and Training phases.

E. Support, Maintenance, Modifications, Warranty, and Enhancements

1. **The vendor shall provide technical support and maintenance services to address any issues or questions related to the system.** Support shall be available via phone and email during business hours *[specify hours of operation]*. The vendor should provide a guaranteed response time for support inquiries within 24 hours and establish a target resolution time for resolving issues.
2. **The vendor shall provide regular product releases and upgrades to enhance system functionality and address any identified issues**. These releases and upgrades should be provided to the client organization at no additional cost, ensuring that the system remains up to date with the latest technology and features. The vendor should specify the frequency of releases and upgrades (e.g., quarterly, biannually) and communicate the process for installing and implementing these updates.
3. **Notification of system downtime requirements**: The vendor shall provide advance notification to the client organization regarding any planned system downtime for maintenance, upgrades, or other necessary activities. The vendor should specify the duration of the downtime and the expected impact on system availability. The notification should be provided within a reasonable time (e.g., at least two weeks in advance) to allow the client organization to plan and mitigate any potential disruptions.
4. **Disaster recovery**: The vendor shall outline the disaster recovery procedures and requirements to ensure business continuity in the event of system downtime, data loss, or other critical incidents. This should include measures to minimize system downtime, backup and restoration protocols, and response times for addressing any system issues or failures. The contract should establish the vendor's responsibilities and obligations in terms of disaster recovery. If the downtime/uptime falls below

the agreed-upon threshold, the vendor should provide compensatory measures or credits to the client organization.

5. **The vendor shall provide the availability of 100 pool hours annually for system changes and modifications.** Pool hours refer to a predetermined number of hours that the vendor allocates for system-related customization, configuration, or enhancements requested by the client organization. The vendor should specify the terms and conditions for utilizing pool hours, including any limitations or restrictions.

Please provide a comprehensive description of how the organization can fulfill the specified requirements regarding support, maintenance, modifications, warranty, and enhancements.

III. Project Management

A. **The vendor shall provide resumés of the project leads responsible** for managing and overseeing the project. The resumés should include relevant experience, qualifications, and a summary of their roles and responsibilities in previous projects. The client organization reserves the right to review and approve the proposed project leads before finalizing the contract.

B. **The project leads assigned by the vendor shall possess Project Management Professional (PMP) certification** or equivalent, demonstrating their proficiency in project management methodologies and best practices. The certification should be valid and maintained throughout the duration of the project.

C. **The vendor shall develop a comprehensive project work plan** that outlines the activities, tasks, milestones, and deliverables associated with each phase of the project. The vendor may indicate a preference for a specific project management approach, such as waterfall, agile, or a hybrid agile/waterfall methodology. The vendor should align their project management approach while ensuring efficient project execution and successful outcomes.

D. **The vendor shall provide a detailed timeline** that specifies the start and end dates for each phase of the project, as well as major milestones and key deliverable deadlines. The timeline should be realistic and consider any dependencies or constraints identified during the planning phase. The client organization may review and approve the proposed timeline before finalizing the contract.

E. **The vendor shall establish clear communication channels and protocols** for regular project updates and status reporting. The client organization expects timely and proactive communication regarding project progress, issues, risks, and any necessary decisions or approvals. The vendor should specify the frequency and format of project status reports, meetings, and other communication methods to ensure effective collaboration and transparency throughout the project lifecycle.

F. **The vendor shall collaborate and coordinate with other State contractors and stakeholders**, if applicable, to ensure the smooth integration and alignment of activities across multiple projects or systems. The vendor should establish mechanisms for effective communication, coordination, and resolution of any interdependencies or conflicts that may arise during the project.

Please provide a thorough explanation of how the organization can meet the specified requirements for project management needs. Include relevant details about the team's qualifications, experience, and methodologies. Additionally, please indicate attachments, such as resumés or work plans, for supporting documentation.

IV. Deliverables

A. **The vendor shall provide an overview of the expected deliverables** for each phase of the project, along with their associated timelines. The deliverables should be clearly defined, measurable, and aligned with the project objectives. The client organization may review and approve the deliverables before their commencement.

B. **The vendor shall outline the criteria and process for approving deliverables**. The client organization expects that each deliverable meets the defined requirements, quality standards, and any applicable acceptance criteria. The vendor should provide a clear procedure for review, feedback, and approval of deliverables to ensure their successful completion.

Please provide an overview of the deliverables that the organization will provide, along with a comprehensive explanation of the criteria and process for approving deliverables.

V. Payment Schedule

A. **The payment schedule shall be established**, detailing the frequency and timing of payments for the project. The payment schedule may be defined specifically, such as quarterly payments, or it may be left open to be determined during the contracting process based on mutual agreement between the *[SVRA]* and vendor.

B. **The payment schedule should account for any software costs**, including licensing fees or subscription charges, as well as renewal costs for ongoing support and maintenance services.

C. **The payment schedule should also take into consideration instances where payments cannot be made.** This should include compliance with any applicable State procurement requirements related to payment processing.

Please provide details on the proposed payment schedule, including a breakdown of the associated costs.

VI. Contract Requirements

A. **The vendor may be required to provide proof of concept**, such as a demonstration of the system's key functionalities, user interface, or specific modules relevant to the project. This proof of concept will allow the client organization to assess the system's fit, usability, and alignment with their requirements before finalizing the contract.

B. **The selected vendor must fulfill the insurance requirements** set by the *[SVRA]*. The vendor should provide evidence of sufficient insurance coverage upon contract award. Please refer to the specified insurance requirements *[insert requirements or link to reference]* for detailed information.

C. **The selected vendor shall consider the needs and preferences** of the organization concerning storage and archiving solutions for the project. The proposal must address both initial and ongoing costs associated with implementing the storage and archiving system, including, but not limited to, hardware, software, and maintenance expenses.

D. **The vendor shall provide options and recommendations for data storage**, considering the specific needs and preferences of the organization. This may include on-premises storage solutions, cloud storage, or hybrid approaches. The proposal should outline the advantages, disadvantages, and associated costs of each option, enabling the organization to make an informed decision based on the requirements.

E. **The vendor is required to meet all Federal and State contractual requirements.**

F. **The proposed storage and archiving solution should be scalable to accommodate future data growth** and evolving organizational needs. The vendor shall demonstrate how the system can be adapted and expanded over time without significant disruptions or additional costs.

VII. Proposal Instructions, Timeline, and Evaluation Process

A. **Instructions for Submitting Proposals**

1. Interested vendors should submit their proposals in electronic format (PDF or Word document) to the designated email address: *[Insert Email Address]*.
2. The subject line of the email should be: "RFP Submission: *[Project Name]*."
3. Proposals must be received no later than *[Submission Deadline Date]* at *[Submission Deadline Time]*.
4. Late submissions will not be accepted or evaluated.
5. Vendors should provide their contact information, including the primary point of contact, company name, address, phone number, and email address.
6. Proposals should be organized and labeled according to the sections outlined in the RFP document.
7. Any supporting documents, such as resumés, work plans, or references, should be included as separate attachments.

B. Timeline and Key Dates

1. RFP Release Date: *[Date]*
2. Pre-Proposal Meeting: *[Date]*
3. Deadline for Submission of Written Questions: *[Date]*
4. SVRA Responses to Written Questions: *[Date]*
5. Proposal Submission Deadline: *[Date]*
6. Evaluation Process and Vendor Shortlisting: *[Date]*
7. Proposal Evaluation Committee Review: *[Date]*
8. Clarification and Negotiation Period (if applicable): *[Date]*
9. Finalize Contracts and Notify Winning Vendor: *[Date]*

C. Proposal Evaluation Criteria & Weight: To evaluate proposals for the development of a configurable statewide case management system, the following evaluation criteria and weighted score are suggested for the Scope and Objectives section:

1. Understanding of Scope and Objectives (X%)
   a. Demonstrated understanding and experience of vocational rehabilitation programs.
   b. Clear alignment of the proposed solution with the scope of work outlined in the project.
   c. Ability to address the unique needs of the SVRA while ensuring compliance with regulatory requirements.
2. Approach to Scope Management (X%)
   a. Proficiency in utilizing project management methodologies to ensure effective scope management.
   b. Development of a comprehensive project work plan tailored to the organization's needs.
   c. Thorough risk management plan that identifies, assesses, mitigates, and monitors risks throughout the project lifecycle.
3. Stakeholder Collaboration and Engagement (X%)
   a. Clearly defined process for engaging stakeholders and gathering their requirements.
   b. Proposed strategies for collaboration, meetings, and alignment with stakeholders.
   c. Proven experience in coordinating with diverse stakeholders, including partner organizations and service providers.

4. Data Security and Compliance (X%)
    a. Strong understanding of data security requirements and compliance with relevant regulations.
    b. Detailed security plan that includes data encryption, access controls, user authentication, and audit trails.
    c. Demonstrated experience in safeguarding sensitive protected identifiable information (PII).
5. Adaptive Technology and Accessibility (X%)
    a. Commitment to designing an accessible system that complies with accessibility standards.
    b. Prior experience in delivering accessible solutions and accommodating users with disabilities.
    c. Approach to incorporating adaptive technology and ensuring compatibility with assistive technologies.
6. Cost (X%)
    a. Implementation Costs: Initial expenses associated with deploying the case management system, including software licenses, hardware infrastructure, customization, integration with existing systems, data migration, and any additional setup costs.
    b. Licensing and Subscription Fees: Ongoing fees for software licenses and subscriptions required for the case management system.
    c. Maintenance and Support Costs: Costs associated with system maintenance, updates, bug fixes, and technical support.

D. Clarification and Negotiation Process

1. After the initial evaluation, shortlisted vendors may be invited for clarification meetings or interviews to address any questions or concerns regarding their proposals.
2. Negotiations may be conducted with the selected vendor(s) to finalize contractual terms, pricing adjustments, or any necessary modifications to the proposed solution.
3. The SVRA reserves the right to enter negotiations with one or more vendors or reject all proposals if deemed necessary.