

Data Management and Analytics (DMA)

RFP 5330Z1 Appendix B – Proposal Format Instructions

Table of Contents

I. Proposal Format Instructions.....2

II. Proposal Library4

RFP 5330Z1 - Appendix B – Proposal Format Instructions

I. Proposal Format Instructions

The State has established a consistent format the bidders should utilize in proposal response submission. A Table of Contents shall be included at the beginning of the proposal response. The Table of Contents should include the proposal response section number and starting page number for each proposal response section. The table below contains the instructions for structuring of the proposal response sections along with the RFP sections to be addressed in the proposal response section. Bidders may include subsections as appropriate within the proposal response section following the section numbering format. For example, section 2.8 Summary of Bidder's Corporate Experience could include subsections 2.8.1, 2.8.2, etc.

| Proposal Response Section | RFP Sections to be Addressed |
|--|--|
| Section 1 – Request for Proposal Form | RFP Section V.A |
| Section 2 – Corporate Overview | RFP Section V.B |
| Section 2.1 - Bidder Identification and Information | RFP Section V.B.1 |
| Section 2.2. – Financial Statements | RFP Section V.B.2 |
| Section 2.3 – Change of Ownership | RFP Section V.B.3 |
| Section 2.4 – Office Location | RFP Section V.B.4 |
| Section 2.5 – Relationships With The State | RFP Section V.B.5 |
| Section 2.6 – Bidder's Employee Relations to State | RFP Section V.B.6 |
| Section 2.7 – Contract Performance | RFP Section V.B.7 |
| Section 2.8 – Summary of Bidder's Corporate Experience | RFP Section V.B.8 |
| Section 2.9 – Summary of Bidder's Proposed Personnel / Management Approach | RFP Section V.B.9 |
| Section 2.10 – Sub-Contractors | RFP Section V.B.10 |
| Section 3 – Summary of Understanding | RFP Appendix A – Statement of Work Section I |
| Section 4 - DDI | Blank |
| Section 4.1 – Phase Overview | RFP Appendix A – Statement of Work Section II.A |
| Section 4.2 - Project Management Systems Development Life Cycle (SDLC) | RFP Appendix A – Statement of Work Section II.B |
| Section 4.3 - Performance and Status Reporting | RFP Appendix A – Statement of Work Section II.C |
| Section 4.4 - Deliverables | RFP Appendix A – Statement of Work Section II.D |
| Section 4.5 - Quality Assurance and Monitoring | RFP Appendix A – Statement of Work Section II.E |
| Section 4.6 - Change Management | RFP Appendix A – Statement of Work Section II.F |
| Section 4.7 - Data Conversion and Data Load | RFP Appendix A – Statement of Work Section II.G |
| Section 4.8 - Environments | RFP Appendix A – Statement of Work Section II.H |
| Section 4.9 - Disaster Recovery | RFP Appendix A – Statement of Work Section II.I |
| Section 4.10 - Facility | RFP Appendix A – Statement of Work Section II.J |
| Section 4.11 - Organizational Staffing | RFP Appendix A – Statement of Work Section II.K |
| Section 4.12 - Documentation | RFP Appendix A – Statement of Work Section II.L |
| Section 4.13 - User Support | RFP Appendix A – Statement of Work Section II.M |
| Section 4.14 - System Readiness | RFP Appendix A – Statement of Work Section II.N |
| Section 4.15 - Operational Readiness | RFP Appendix A – Statement of Work Section II.O |
| Section 4.16 - Privacy and Security | RFP Appendix A – Statement of Work Section II.P |
| Section 4.17 - Implementation and Contingency | RFP Appendix A – Statement of Work Section II.Q |
| Section 5 – Initial Operations and CMS Certification | Blank |
| Section 5.1 – Phase Overview | RFP Appendix A – Statement of Work Section III.A |
| Section 5.2 – Initial Operations Support and Management | RFP Appendix A – Statement of Work Section III.B |
| Section 5.3 – CMS Certification | RFP Appendix A – Statement of Work Section III.C |
| Section 5.4 – Organizational Staffing | RFP Appendix A – Statement of Work Section III.D |
| Section 5.5 – User Support | RFP Appendix A – Statement of Work Section III.E |
| Section 5.6 – Contingency Planning | RFP Appendix A – Statement of Work Section III.F |
| Section 6.Operations Phase | Blank |
| Section 6.1 – Phase Overview | RFP Appendix A – Statement of Work Section IV.A |

RFP 5330Z1 - Appendix B – Proposal Format Instructions

| Proposal Response Section | RFP Sections to be Addressed |
|---|--|
| Section 6.2 - Project Management and Systems Development Life Cycle | RFP Appendix A – Statement of Work Section IV.B |
| Section 6.3 - Performance and Status Reporting | RFP Appendix A – Statement of Work Section IV.C |
| Section 6.4 – Work Products | RFP Appendix A – Statement of Work Section IV.D |
| Section 6.5 - Quality Assurance and Monitoring | RFP Appendix A – Statement of Work Section IV.E |
| Section 6.6 - Change Management | RFP Appendix A – Statement of Work Section IV.F |
| Section 6.7 - Data and Record Retention | RFP Appendix A – Statement of Work Section IV.G |
| Section 6.8 - Business Continuity and Disaster Recovery | RFP Appendix A – Statement of Work Section IV.H |
| Section 6.9 - Facility | RFP Appendix A – Statement of Work Section IV.I |
| Section 6.10 - Organizational Staffing | RFP Appendix A – Statement of Work Section IV.J |
| Section 6.11 - Documentation | RFP Appendix A – Statement of Work Section IV.K |
| Section 6.12 - User Support | RFP Appendix A – Statement of Work Section IV.L |
| Section 6.13 - Privacy and Security | RFP Appendix A – Statement of Work Section IV.M |
| Section 6.14 – Business Architecture | Blank |
| Section 6.14.1 – General | RFP Appendix A – Statement of Work Section IV.N.1 |
| Section 6.14.2 – Reporting and Analytics | RFP Appendix A – Statement of Work Section IV.N.2 |
| Section 6.14.3 - Creating, managing, and performing statistical analysis, forecasting, and predictive analytics | RFP Appendix A – Statement of Work Section IV.N.3 |
| Section 6.14.4 - Managing Queries and Reports – Predefined and Ad-Hoc | RFP Appendix A – Statement of Work Section IV.N.4 |
| Section 6.14.5 – Program Integrity | RFP Appendix A – Statement of Work Section IV.N.5 |
| Section 6.14.6 – Case Management | Blank |
| Section 6.14.6.1 – General | RFP Appendix A – Statement of Work Section IV.N.6.a |
| Section 6.14.6.2 – Case Identification and Creation | RFP Appendix A – Statement of Work Section IV.N.6.b |
| Section 6.14.6.3 – Manage Case Information | RFP Appendix A – Statement of Work Section IV.N.6.c |
| Section 6.14.6.4 – Audit Cases | RFP Appendix A – Statement of Work Section IV.N.6.d |
| Section 6.14.7 – Encounter Processing | RFP Appendix A – Statement of Work Section IV.N.7 |
| Section 6.15 Information and Technical Architecture | Blank |
| Section 6.15.1 General | RFP Appendix A – Statement of Work Section IV.O.1 |
| Section 6.15.2 – Data Management | RFP Appendix A – Statement of Work Section IV.O.2 |
| Section 6.15.3 – Data Governance | RFP Appendix A – Statement of Work Section IV.O.3 |
| Section 6.15.4 – Master Data Management | RFP Appendix A – Statement of Work Section IV.O.4 |
| Section 6.15.5. – Data Models | RFP Appendix A – Statement of Work Section IV.O.5 |
| Section 6.15.6 – Data Integration | RFP Appendix A – Statement of Work Section IV.O.6 |
| Section 6.15.7 – Data Sharing | RFP Appendix A – Statement of Work Section IV.O.7 |
| Section 6.15.8 – Data Exchanges & Interfaces | RFP Appendix A – Statement of Work Section IV.O.8 |
| Section 6.15.9 – Data Transformation | RFP Appendix A – Statement of Work Section IV.O.9 |
| Section 6.15.10 – Enterprise Data Warehouse | Blank |
| Section 6.15.10.1 – General | RFP Appendix A – Statement of Work Section IV.O.10.a |
| Section 6.15.10.2 – EDW Architecture | RFP Appendix A – Statement of Work Section IV.O.10.b |
| Section 6.15.10.3 – EDW Tools and Methods | RFP Appendix A – Statement of Work Section IV.O.10.c |
| Section 6.15.11 – Reporting and Analytics Tools and Methods | RFP Appendix A – Statement of Work Section IV.O.11 |
| Section 6.15.12 – Rules Engine & Rules Management | RFP Appendix A – Statement of Work Section IV.O.12 |
| Section 6.15.13 – DMA Auditing and Controls | RFP Appendix A – Statement of Work Section IV.O.13 |
| Section 6.15.14 – DMA Infrastructure and Lifecycle Management | RFP Appendix A – Statement of Work Section IV.O.14 |
| Section 7 – Turnover | Blank |
| Section 7.1 – Phase Overview | RFP Appendix A – Statement of Work Section V.A |
| Section 7.2 – Turnover Planning | RFP Appendix A – Statement of Work Section V.B |

RFP 5330Z1 - Appendix B – Proposal Format Instructions

| Proposal Response Section | RFP Sections to be Addressed |
|---|--|
| Section 7.3 – Project Management and Systems Development Life Cycle | RFP Appendix A – Statement of Work Section V.C |
| Section 7.4 – Performance and Status Reporting | RFP Appendix A – Statement of Work Section V.D |
| Section 7.5 – Close-Out Deliverables | RFP Appendix A – Statement of Work Section V.E |
| Section 7.6 – Quality Assurance and Monitoring | RFP Appendix A – Statement of Work Section V.F |
| Section 7.7 – Change Management | RFP Appendix A – Statement of Work Section V.G |
| Section 7.8 – Data and Record Migration and Turnover | RFP Appendix A – Statement of Work Section V.H |
| Section 7.9 – Organizational Staffing | RFP Appendix A – Statement of Work Section V.I |
| Section 7.10 – Cooperation with Successor | RFP Appendix A – Statement of Work Section V.J |
| Section 7.11 – Contract Closeout | RFP Appendix A – Statement of Work Section V.K |
| Section 8 – Deliverable Catalog | RFP Appendix A – Statement of Work – Attachment A – Deliverable Catalog |
| Section 9 – Requirements Matrix | RFP Appendix A – Statement of Work – Attachment B – Business and Technical Requirements Matrix |

For all proposal response sections, bidder's responses should provide the State with a complete, comprehensive, organized, clear and concise description of the bidder's approach to the RFP Section reflecting on the bidder's experience and historic lessons learned which have been applied. Bidders should limit proposal response sections three through seven (excluding proposal library materials) to a combined 500 pages or less.

II. Proposal Library

The RFP contains proposal response instructions that may include artifacts such as document examples, templates, procedures, graphics, charts, etc. These artifacts should be referenced in the RFP section and included in the proposal library. The paper copy of the proposal library should be placed in one or more 3-ring binders containing staggered labeled divider tabs for each individual artifact. The naming convention for the binder tabs should follow the following scheme:

[Proposal Section Number] – [Artifact Number] – [Artifact Name] where [Artifact Number] resets at 1 for each [Proposal Section Number].

For example, if a bidder has two artifacts for proposal section 7.10 – Cooperation with Successor and three artifacts for the for proposal section 7.11 – Contract Closeout, the artifacts should be labeled and named as follows:

- 7.10 – 1 – Artifact Name
- 7.10 – 2 – Artifact Name
- 7.11 – 1 - Artifact Name
- 7.11 – 2 – Artifact Name
- 7.11 - 3 – Artifact Name

Artifact Name is the actual name of the artifact. If an artifact is referenced in multiple proposal sections, the artifact should only be included in the proposal library once and named for the first proposal section in which it is referenced. For example if an artifact is referenced as the third artifact in proposal section 4.2 and is also referenced in 6.2 and 7.3 the artifact should be named 4.2 – 3 – Artifact Name.

The first artifact included in the proposal library should be 0.0 – 1 – Proposal Library Reference Matrix. The matrix should include a cross-reference of all proposal library artifacts in alphanumeric sort order and the sections in which that artifact is referenced. For the same example as above, if an artifact is referenced as the third artifact in proposal section 4.2 and is also referenced in 6.2 and 7.3 the artifact should be included in the matrix as follows:

| Proposal Library Name | Proposal Sections Referenced |
|-------------------------|------------------------------|
| 4.2 – 3 – Artifact Name | 4.2, 6.2, and 7.3 |