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Data Management and Analytics (DMA) RFP # Appendix B – Technical Proposal Format Instructions

July 31, 2015

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# Standard Proposal Format Instructions

The State has established a consistent format for bidders to utilize in proposal submission. A Table of Contents shall be included at the beginning of the proposal. The Table of Contents shall include the proposal section number and starting page number for each proposal section. The table below contains the instructions for structuring of the proposal sections along with the RFP sections to be addressed in the proposal section. Bidders may include subsections as appropriate within the proposal 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.

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| Proposal Section | RFP Sections to be Addressed |
| Section 1 – Request for Proposal Form | RFP Section V.A.1 |
| Section 2 – Corporate Overview | RFP Section V.A.2 |
| Section 2.1 - Bidder Identification and Information | RFP Section V.A.2.a |
| Seciton 2.2. – Financial Statements | RFP Section V.A.2.b |
| Section 2.3 – Change of Ownership | RFP Section V.A.2.c |
| Section 2.4 – Office Location | RFP Section V.A.2.d |
| Section 2.5 – Relationships With The State | RFP Section V.A.2.e |
| Section 2.6 – Bidder’s Employee Relations to State | RFP Section V.A.2.f |
| Section 2.7 – Contract Performance | RFP Section V.A.2.g |
| Section 2.8 – Summary of Bidder’s Corporate Experience | RFP Section V.A.2.h |
| Section 2.9 – Summary of Bidder’s Proposed Personnel / Management Approach | RFP Section V.A.2.i |
| Section 2.10 – Sub-Contractors | RFP Section V.A.2.j Sub-Contractors |
| 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 |
| 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 - Deliverables | 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 |
| 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 – Requirements Matrix |

For all proposal sections, bidder’s responses shall fully describe and provide the State with a clear and detailed description of the bidder’s holistic approach to the RFP Section reflecting on the bidder’s experience and historic lessons learned which have been applied.

# Proposal Library

The RFP contains expectations for document examples, templates, procedures, graphics, charts, etc. throughout the RFP. These documents should be referenced in the RFP section and included in the proposal library. The paper copy of the proposal library shall be placed in one or more 3-ring binders containing staggered labeled divider tabs for each individual document. The electronic copy of the proposal library shall be included in a folder named “Proposal Library”. The naming convention for the binder tabs and file names shall follow the following scheme:

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

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

* 7.10 – 1 – Document Name
* 7.10 – 2 – Document Name
* 7.11 – 1 - Document Name
* 7.11 – 2 – Document Name
* 7.11 - 3 – Document Name

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

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

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