

Vendors must have an active, approved master contract under the SITE program and be approved in the category or categories listed in the RFO document in order to respond to an RFO. Vendor is responsible for reading all addenda associated with the RFO.

IT Professional Technical Services

SITE Program

T#:14ATM

Request for Offers (RFO)

For Technology Services

Issued By

MN.IT Services at DHS

Project Title: System Modernization – Cúram Trainer

Category: Cúram Trainer

Resources: Seeking one (1) resource.

Business Need

The Minnesota Department of Human Services (DHS) requires the services of a Cúram trainer to fulfill the extensive need for DHS to have Cúram-trained technical state developers to support the existing MNsure application as well as several large Cúram-based system modernization efforts. As a result, a team of Java developers have been hired by MN.IT Services and they are required to be skilled in the Cúram software suite in order to support these ongoing and future efforts.

The Cúram Trainer will have the lead role, working as the liaison between stakeholders in the design and development of Cúram/integrated computer system and policy training presentation materials. This requires an advanced knowledge of Cúram base functionality including typical configuration and customization modification approaches. The Cúram Trainer will conduct integrated computer system and policy training, design and deliver specialized courses for specific populations or functions, and evaluate training activities to ensure that training needs are met. The Cúram Trainer will develop, maintain, and administer online learning, stand-up training, and knowledge transfer through other methods as well as produce and edit written documentation as appropriate. The Cúram Trainer will analyze current and future curriculum content to determine which material is most appropriate for this delivery method and determine how to integrate online learning with other delivery methods.

Project Deliverables

The Cúram technical trainer will provide a sound foundation for MN.IT Java developers to grow their Cúram expertise and develop correct coding standards & compliancy, as well as learn and apply Cúram best practices. We would prefer component-based training sessions spread over a number of weeks, rather than a Cúram Boot Camp approach. Our vision is to train Cúram in numerous sessions, and spread the sessions over months, which will enable the developers to use the knowledge and skills they have acquired in training by applying it to actual project work, supplemented by hands-on guidance as necessary.

There will be a need for at least 2 tracks to accommodate training 20+ developers, with a maximum of 12 developers in each track. For continuity, it would be prudent to have one trainer responsible for tracks organized in a staggered or consecutive manner.

DELIVERABLE 1 – Overview / Introduction to Cúram

1. Architectural overview of the Cúram Social Program Management (SPM) Platform
2. Architectural overview of the Cúram Application Development Environment (ADE)
 - a. Development environment installations
 - b. Features and tools for modeling
 - c. Testing and troubleshooting
 - d. OOTB reference model
 - e. Customizing client and server artifacts compliantly
 - f. Customizing handcrafted services layer interfaces
3. Set-up and understand the Organizational Structure and the security roles
4. Exercises and hands-on guidance (includes setting up the environment)

DELIVERABLE 2 – Modeling and User Interface

1. Modeling in Cúram
2. Cúram User Interface / Façades
3. Exercises and hands-on guidance
4. Follow on project work applying lessons learned

DELIVERABLE 3 – Financials and Case Eligibility

1. Cúram Financials
2. Cúram Case Eligibility and Entitlement
3. Cúram Express Rules
4. Exercises and hands-on guidance
5. Follow on project work applying lessons learned

DELIVERABLE 4 – Workflow and IEG

1. Workflow Technical / Functional development
2. Intelligent Evidence Gathering (IEG)
3. Batch Processing
4. Exercises and hands-on guidance
5. Follow on project work applying lessons learned

DELIVERABLE 5 – SOA and Portals

1. Cúram SOA / Integration / Web Services
2. Portals - (Core: Screening/Intake/Triage and Universal Access Module)
3. Cúram Production Problem Analysis and Resolution
4. Exercises and hands-on guidance
5. Follow on project work applying lessons learned

Estimated Project Milestones and Schedule

- Projected Engagement Start Date: November 28, 2016
- Projected Engagement End Date: November 27, 2017
- The State will retain the option to extend the work order up to the expiration date of the SITE program on 4/15/2019, in increments determined by the State.

Project Environment

The Cúram Trainer will be working with the current Cúram development and implementation teams. The trainer will also be responsible for the training of Java developers who may or may not have Cúram experience. The State of Minnesota requires an individual with expertise with the Cúram framework to continue training and provide knowledge transfer to State staff. Currently, DHS uses Cúram for multiple applications and the trainer would be responsible for assisting multiple teams.

Project Requirements

- All trainings must be performed onsite at DHS offices in St. Paul, MN. Development of training materials may be done offsite as approved by the State's Project Manager.
- Work must comply with the Statewide Enterprise Architecture
- Work must comply with the State's Enterprise Security Policy and Standards
- Work must comply with applicable industry/agency standards
- Resources must be able to work independently, with little or no supervision
- Resource may occasionally be expected to work up to fifty (50) hours per week dependent on training needs.

Responsibilities Expected of the Selected Vendor

Responsibilities include, but are not limited to:

- Develop and deliver Cúram training.
- Transfer knowledge to MN.IT Services @ DHS staff.
- Structure classroom times to include time between classes for additional practice of previous material.
- Have additional practice examples available.
- Have additional resources available for questions pertaining to training materials during non-classroom periods during the duration of the contract.

Mandatory Qualifications (to be scored as pass/fail)

At a minimum, a proposed resource must meet the following mandatory qualifications. Resource submissions that do not clearly demonstrate that these mandatory qualifications are met will not be considered under this RFO.

Mandatory Qualifications	Years of Experience
B.S or B.A degree with one (1) year of experience as an IT Trainer OR Associate's degree with three (3) years of experience as an IT Trainer OR Five (5) years of experience as an IT Trainer	
Experience as a Cúram developer (v.6.0 or higher)	2
Experience in presenting technical training materials to audiences of at least ten developers	Any
Combined experience creating Cúram technical training plans and presenting Cúram technical training materials	5

Desired Skills

Proposed resources that meet the Mandatory Qualifications will be evaluated on the following Desired Skills. Responder should demonstrate in its proposal the length, depth, and applicability of the proposed resource's prior experience in the desired skills below.

Desired Skills
Experience in design and delivery of successful Health & Human Services projects
Experience with Cúram best practices
Experience in presenting technical training materials to audiences of at least ten developers
Experience creating Cúram technical training plans and presenting Cúram technical training materials based on the five (5) deliverables identified in this RFO

Process Schedule

Deadline for Questions	October 5, 2016, 1:00 p.m. CDT
Anticipated Posted Response to Questions	October 7, 2016
Proposals due	October 12, 2016, 1:00 p.m. CDT
Anticipated proposal evaluation & decision	November 2, 2016

Questions

Any questions regarding this Request for Offers must be submitted via e-mail according to the date and time listed in the Process Schedule to:

Robin Wegener, Contract Manager
MN.IT Central
robin.wegener@state.mn.us

Questions and answers will be posted via an addendum to the RFO on the Office of MN.IT Services website (<http://mn.gov/buyit/14atm/rfo/active.html>) according to the Process Schedule above.

Other persons ARE NOT authorized to discuss this RFO or its requirements with anyone throughout the selection process and responders should not rely on information obtained from non-authorized individuals. If it is discovered a Responder contacted State staff other than the individual above, the responder's proposal may be removed from further consideration.

RFO Evaluation Process

The Responders’ proposals will be evaluated on the following components.

Factor	Weight	Total Points
Mandatory Qualifications	Pass/Fail	
Desired Skills	70%	700
Cost	30%	300
Total	100%	1000

A. Evaluation of Desired Skills. Points have been assigned to the Desired Skills. The total possible points for each Desired Skill are as follows:

Desired Skills Weight

Desired Skill	Weighted Value
Experience in design and delivery of successful Health & Human Services projects	100
Experience with Cúram best practices	100
Experience in presenting technical training materials to audiences of at least ten developers	100
Experience creating Cúram technical training plans and presenting Cúram technical training materials based on the five (5) deliverables identified in this RFO	400
Total	700

The evaluation team will review the desired skills of each resource that has met the Mandatory Qualifications. After reviewing the desired skills, the members of the evaluation team will rate each desired skill using the following formula:

Component Rating	Point Factor
Excellent	1.0
Very Good	0.8
Good	0.6
Satisfactory	0.4
Poor	0.2
Unacceptable	0.0

Upon determining which of the above Ratings best describes the desired skill being rated, the total possible points available for the component from the Desired Skills Weight table (above) will be multiplied by the corresponding point factor in the Component Rating table (above) to determine scores.

EXAMPLE: A “Very Good” rating of (0.8) for “Experience with Cúram best practices” worth a maximum of 100 points would receive a score of 80 (100 x 0.8 = 80).

The State reserves the right to interview any or all proposed resources. In the event interviews are conducted, Desired Skills scores may be adjusted based on additional information derived during the interview process. The State further reserves the right to remove a resource from consideration if the resource is unavailable for interview as requested by the State.

The State also reserves the right to contact proposed resources' references and to adjust Desired Skills scores based on additional information derived from the reference checks.

B. Evaluation of Cost Proposals

Lowest cost will be determined by the Cost Proposal rate submitted by the Responder. The Proposal with the lowest cost will receive 100% of the available points. The other Proposals will receive points using the following formula:

$$\frac{\text{Lowest Proposal Rate}}{\text{Responder's Proposal Rate}} \times \text{Maximum Points} = \text{Points Awarded}$$

EXAMPLE: (Using 300 points as maximum): If Responder A submitted the lowest rate of \$100.00, and Responder B submitted a rate of \$117.00, Responder A would receive 300 points and Responder B would receive 256.41 points (100.00 ÷ 117.00 x 300 = 256.41)

This Request for Offers does not obligate the State to award a work order or complete the assignment, and the State reserves the right to cancel the solicitation if it is considered to be in its best interest. The State reserves the right to reject any and all proposals.

Submission Format. The proposal should be assembled as follows:

1. Cover Page

- Master Contractor Name
- Master Contractor Address
- Contact Name for Master Contractor
- Contact's direct phone/cell phone (if applicable)
- Contact's email
- Resource Name being submitted

2. Overall Experience:

A. Mandatory Qualifications (Pass/Fail). Responder must establish that the proposed resource meets the mandatory qualifications under this RFO by attaching a resume identifying the companies and contacts where the resource has demonstrated the mandatory qualifications. (Be certain that the resume has dates of work and notes whether the resource was an employee or consultant.) If the proposal and resume do not demonstrate that the resource meets all of the mandatory qualifications, the State will discontinue further scoring of the proposal. ***You must copy the chart below and insert it into your proposal with information filled out to indicate how the proposed resource satisfies each mandatory qualification.***

RESOURCE NAME:		
Mandatory Qualifications	Years of Experience	Description of how the resource satisfies the mandatory qualification (Yes/No is not sufficient)
B.S or B.A degree with one (1) year of experience as an IT Trainer OR Associate's degree with three (3) years of experience as an IT Trainer OR Five (5) years of experience as an IT Trainer		
Experience as a Cúram developer (v.6.0 or higher)	2	
Experience in presenting technical training materials to audiences of at least ten developers	Any	
Combined experience creating Cúram technical training plans and presenting Cúram technical training materials	5	

- B. Desired Skills.** Responder must demonstrate the length, depth, and applicability of the proposed resource's prior experience pertaining to the Desired Skills. Responders must attach a resume identifying the desired skills, including companies and contacts where the proposed resource has demonstrated the desired skills described in this RFO. (Be certain that the resume has dates of work and notes whether the resource was an employee or consultant.) Points will be awarded based on the extent to which the proposed resource has the desired skills. ***You must copy the chart below and insert it into your proposal with information filled out to indicate the extent to which the proposed resource satisfies each desired skill.***

RESOURCE NAME:	
Desired Skills	Description of how the resource satisfies the desired skill (Yes/No is not sufficient)
Experience in design and delivery of successful Health & Human Services projects	
Experience with Cúram best practices	
Experience in presenting technical training materials to audiences of at least ten developers	
Experience creating Cúram technical training plans and presenting Cúram technical training materials based on the five (5) deliverables identified in this RFO	Complete the 'Experience with Specific Deliverables' chart, below, to indicate how the resource satisfies this desired skill.

At any time during the evaluation phases, the State may contact a vendor for additional or missing information or for clarification of the Response. However, the State does not guarantee that it will request information or clarification outside the submitted written response. To avoid the possibility of failing the evaluation phase or of receiving a low score due to inadequate information, it is important that the vendor submits a complete Response and fully meets all requirements.

- C. Experience with Specific Deliverables.** Responder must demonstrate the length, depth, and applicability of the proposed resource’s experience creating Cúram technical training plans and presenting Cúram technical training materials based on the five (5) deliverables identified in this RFO. (See the fourth Desired Skill, above.) **You must complete the chart below and insert it into your proposal with information filled out to indicate the resource’s experience with the specific Cúram training deliverables set forth herein.**

RESOURCE NAME:	
Deliverable	Description of the resource’s experience in providing the specific Cúram training deliverable. (Include companies, dates of work, and an indication of which of the subparts of the deliverable were provided for each engagement.)
<p>DELIVERABLE 1 – Overview / Introduction to Cúram</p> <ol style="list-style-type: none"> 1. Architectural overview of the Cúram Social Program Management (SPM) Platform 2. Architectural overview of the Cúram Application Development Environment (ADE) <ol style="list-style-type: none"> a. Development environment installations b. Features and tools for modeling c. Testing and troubleshooting d. OOTB reference model e. Customizing client and server artifacts compliantly f. Customizing handcrafted services layer interfaces 3. Set-up and understand the Organizational Structure and the security roles 4. Exercises and hands-on guidance (includes setting up the environment) 	
<p>DELIVERABLE 2 – Modeling and User Interface</p> <ol style="list-style-type: none"> 1. Modeling in Cúram 2. Cúram User Interface / Façades 3. Exercises and hands-on guidance 4. Follow on project work applying lessons learned 	
<p>DELIVERABLE 3 – Financials and Case Eligibility</p> <ol style="list-style-type: none"> 1. Cúram Financials 2. Cúram Case Eligibility and Entitlement 3. Cúram Express Rules 4. Exercises and hands-on guidance 5. Follow on project work applying lessons learned 	
<p>DELIVERABLE 4 – Workflow and IEG</p> <ol style="list-style-type: none"> 1. Workflow Technical / Functional development 2. Intelligent Evidence Gathering (IEG) 3. Batch Processing 4. Exercises and hands-on guidance 5. Follow on project work applying lessons learned 	

RESOURCE NAME:	
Deliverable	Description of the resource's experience in providing the specific Cúram training deliverable. (Include companies, dates of work, and an indication of which of the subparts of the deliverable were provided for each engagement.)
DELIVERABLE 5 – SOA and Portals <ol style="list-style-type: none"> 1. Cúram SOA / Integration / Web Services 2. Portals - (Core: Screening/Intake/Triage and Universal Access Module) 3. Cúram Production Problem Analysis and Resolution 4. Exercises and hands-on guidance 5. Follow on project work applying lessons learned 	

D. References. Provide the names of two (2) references who can speak to the resource's work on a similar project. Include the company name and address, reference name, reference email, reference phone number and a brief description of the project the resource completed.

3. Cost Proposal Must be in a SEPARATE DOCUMENT and not listed in any other place in your submission. Include a separate document labeled "Cost Proposal" which includes the name of the resource being submitted and their proposed hourly rate.

4. Conflict of interest statement as it relates to this project

5. Additional Statement and forms. Responders must complete and submit the following forms, if applicable, in response to this RFO:

A. Affirmative Action Certificate of Compliance (if over \$100,000, including extension options)

<http://www.mmd.admin.state.mn.us/doc/affaction.doc>

B. Equal Pay Certificate Form (if proposals exceeds \$500,000, including extension options)

<http://www.mmd.admin.state.mn.us/doc/equalpaycertificate.doc>

C. Affidavit of non-collusion

<http://www.mmd.admin.state.mn.us/doc/noncollusion-2.doc>

D. Certification Regarding Lobbying (if over \$100,000, including extension options)

<http://www.mmd.admin.state.mn.us/doc/lobbying.doc>

The STATE reserves the right to determine if further information is needed to better understand the information presented. This may include a request for a presentation.

Proposal Submission Instructions

- **Each vendor is limited to the submission of one (1) proposed resource in response to this Request for Offers.**
- Responses must be submitted via e-mail to:
 - Robin Wegener, Contract Manager, MN.IT Central
robin.wegener@state.mn.us
 - Email subject line must read: [Vendor name] – RFO0152 Cúram Trainer Response
 - Submissions are due according to the Process Schedule previously listed.
- The e-mailed response should contain three (3) attached .pdf files
 - One (1) file containing the cover page, resume, completed Mandatory Qualifications and Desired Skills charts, completed Experience with Specific Deliverables chart, and references, labeled “Response”
 - One (1) file containing the cost proposal only, labeled “Cost Proposal”
 - One (1) file containing all other supporting documentation, labeled “Supporting Documentation”
- A copy of the response must also be sent to MNIT.SITE@state.mn.us for vendor performance tracking.
- You must submit an email with your response – or email notification that you will not respond – to MNIT.SITE@state.mn.us. Failure to do either of these tasks will count against your program activity and may result in removal from the program.

General Requirements

Proposal Contents. By submission of a proposal, Responder warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of this work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the responder to suspension or debarment proceedings as well as other remedies available by law.

Indemnification. In the performance of this contract by Contractor, or Contractor’s agents or employees, the contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney’s fees incurred by the state, to the extent caused by Contractor’s:

- 1) Intentional, willful, or negligent acts or omissions; or
- 2) Actions that give rise to strict liability; or
- 3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State’s sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State’s failure to fulfill its obligation under this contract.

Disposition of Responses. All materials submitted in response to this RFO will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected vendor. If the Responder submits information in response to this RFO that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Responder must: clearly mark all trade secret materials in its response at the time the response is submitted, include a

statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this RFO, the Responder agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Responder to be proprietary or trade secret materials.

Conflicts of Interest. Responder must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The responder warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a vendor is unable or potentially unable to render impartial assistance or advice to the State, or the vendor's objectivity in performing the contract work is or might be otherwise impaired, or the vendor has an unfair competitive advantage.

The responder agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organization conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the responder was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default.

The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime contractor, and the terms "contract," "contractor," and "contracting officer" modified appropriately to preserve the State's rights.

IT Accessibility Standards. All documents and other work products delivered by the vendor must be accessible in order to conform to the State Accessibility Standard. Information about the Standard can be found at: <http://mn.gov/mnit/programs/policies/accessibility/>.

Preference to Targeted Group and Economically Disadvantaged Business and Individuals

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal, and certified Economically Disadvantaged Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal. Eligible TG businesses must be currently certified by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials Management Helpline at 651.296.2600, or you may reach the Helpline by email at mmdhelp.line@state.mn.us. For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

Veteran-Owned Small Business Preference

Unless a greater preference is applicable and allowed by law, in accordance with Minn. Stat. § 16C.16, subd. 6a, the Commissioner of Administration will award a 6% preference in the amount bid on state procurement to certified small businesses that are majority owned and operated by veterans.

A small business qualifies for the veteran-owned preference when it meets one of the following requirements. 1) The business has been certified by the Department of Administration/Materials Management Division as being a veteran-owned or service-disabled veteran-owned small business. 2) The principal place of business is in Minnesota AND the United States Department of Veterans Affairs verifies the business as being a veteran-owned or service-disabled veteran-owned small business under Public Law 109-461 and Code of Federal Regulations, title 38, part 74 (Supported By Documentation). See Minn. Stat. § 16C.19(d).

Statutory requirements and certification must be met by the solicitation response due date and time to be awarded the preference.

Work Force Certification. For all contracts estimated to be in excess of \$100,000, responders are required to complete the Affirmative Action Certificate of Compliance and return it with the response. As required by Minnesota Rule 5000.3600, "It is hereby agreed between the parties that Minnesota Statute § 363A.36 and Minnesota Rule 5000.3400 - 5000.3600 are incorporated into any contract between these parties based upon this specification or any modification of it. A copy of Minnesota Statute § 363A.36 and Minnesota Rule 5000.3400 - 5000.3600 are available upon request from the contracting agency."

Equal Pay Certification. If the Response to this solicitation could be in excess of \$500,000, the Responder must obtain an Equal Pay Certificate from the Minnesota Department of Human Rights (MDHR) or claim an exemption prior to contract execution. A responder is exempt if it has not employed more than 40 full-time employees on any single working day in one state during the previous 12 months. Please contact MDHR with questions at: 651-539-1095 (metro), 1-800-657-3704 (toll free), 711 or 1-800-627-3529 (MN Relay) or at compliance.MDHR@state.mn.us.