REQUEST FOR BID NO. P-261
SOFTWARE, CASE MANAGEMENT

REVISED Due Date: 09/11/20, Time: 3:30 PM

AMENDMENT NO. 6
DATED 08/27/20

BID@BALTIMORECOUNTYMD.GOV

AMBER BUTCHER, STAFF BUYER
PHONE: 410-887-3887

PLEASE SIGN BELOW ACKNOWLEDGING RECEIPT OF THIS ADDENDUM AND RETURN WITH YOUR BID.

__________________________________________________________________________
Company Name                                                                 Signature
1. Amend to revised due date to Friday, September 11, 2020 at 3:30pm.

2. Revised Attachment G 07-24-20 has been replaced with Revised Attachment G 082820.

3. Question: We would like to know what exactly does it mean Commercial Off the Shelf (COTS) solution?
   Answer: Commercial off-the-shelf or commercially available off-the-shelf products are packaged solutions which are then adapted to satisfy the needs of the purchasing organization, rather than the commissioning of custom-made, or bespoke, solutions. COTS purchases are alternatives to custom software or one-off developments.

4. Question: Is it permissible to perform services under the contract outside the United States.
   Answer: The County does not allow off shore data storage. Other services will be reviewed and considered on a case-by-case basis.

5. Question: Can you further explain the desired request for an installation period of no more than 40 hours if allowable? Is that to include all 4 agencies involved in this solution?
   Answer: This is to align with our request for COTS product.

6. Question: Does the County currently maintain client data that will have to be migrated into the system?
   Answer: Yes. The Just In Time (JIT) data warehouse with potential to connect with internal electronic medical records (EMR).

7. Question: Will the case management system need to interact with any existing line of business systems? If yes, how many?
   Answer: JIT data warehouse with potential to connect with internal EMR.

8. Question: Are there any required interfaces to other County information systems?
   Answer: JIT data warehouse with potential to connect with internal EMR.

9. Question: What is the current hardware environment for the County? Servers, storage, firewalls, etc.
   Answer: The County has multiple environment configurations.

10. Question: Are the mobile devices on one platform or are they a mix of Apple and Android?
   Answer: Apple and Android.

11. Question: Mandatory Requirement 2.012: What is an encounter? Who are involved in an encounter? What are the outcomes of an encounter?
12. Question: Mandatory Requirement 2.03: Please provide more information on trainings? What kind of trainings are available and who are the intended audience (internal staff and/or general public)? Are the trainers internal to HHS or are trainers from external authorized agency?

Answer: Refer to example in 2.03.

13. Question: What are the current databases is the County using? Apart from the scale backend, is there any other software is the agency using?

Answer: See Amendment 1 question no. 29. The County is currently creating databases.

14. Question: To clarify the question, Is it permissible to perform services such as application configuration and development under the contract outside the United States as long as the software system and all data is housed in the United States.

Answer: No.

15. Question: Can we provide subcontractor references/a combination of Prime and subcontractors to meet the reference requirements?

Answer: References from a combination of Prime and subcontractor(s) can only be provided if the vendor is utilizing the subcontractor for the County’s project. And that the vendor would need to clearly identify who was the Prime Contractor of the offered reference.

16. Question: Are we able to get the specific data pieces they are looking to track?

Answer: Please refer to Attachment F and the examples provided there.

17. Question: What was the dollar amount of the grant provided by CDC?

Answer: 
https://www.federalgrants.com/Overdose-Data-to-Action-74931.html#:~:text=Overdose%20Data%20to%20Action%20%20Federal%20Grant,February%201st%202019%20%20more%20rows%20

https://www.cdc.gov/drugoverdose/od2a/index.html

18. Question: What is the projected dollar amount for award?

Question: What is the budget for the project?

Question: Do you have any budget frame for this project?

Answer: The total award may vary upon solution and options offered. As this is a new solution for the County, the spend may exceed or be fully covered the grant awarded funds to provide a solution that is advantageous to the County.

19. Question: How many environments is the County looking for? i.e. test/train/production?

Answer: At minimum, the County would want test/train/production.

20. Question: When talking about configuration time – is the time estimate you are looking for inclusive of configuring and unit testing or does it also include any demo and completion of UAT? Configuration questions is related to the definition you have in Attachment F - for example: Level 1 – This means the capability comes out of the box but requires 1 to 2 hours of configuration.

Answer: It is configuration time only.
21. **Question:** If it is hosted, what about confidentiality of your data?
   **Answer:** If the solution provided is hosted, the Offeror will be required to provide a SOC2.

22. **Question:** Is GSA certification required?
   **Answer:** No.

23. **Question:** Can we propose to this proposal to have MBE/WBE set aside?
   **Answer:** Baltimore County does not have set asides. MBE/WBE participation and/or Economic Benefit Factor should be provided if any. This is part of the evaluation criteria.

24. **Question:** Do specific assessments or evaluations need to be built into the case management system (such as a mental health evaluation) or are these just documents that need to be scanned and attached to a client record? (Attachment F - requirement 2.006)
   **Answer:** Any enhanced features offered in addition to the listed requirements will be taken into consideration during evaluation.

25. **Question:** Is there a level for requirements that does not take any configuration but works out of the box?
   **Answer:** The lowest level is a level 1, in which this would apply.

26. **Question:** If data is to be migrated can sample data be provided for data conversion estimates?
   **Answer:** Not at this point in time.

27. **Question:** Where and how should we respond to answers for Mandatory Requirements i.e. Customization or Customization and What Level? Should we add a column for the response?
   **Answer:** Use Attachment G and make any notes in the comment column. If necessary additional documentation may be attached.

28. **Question:** Were these software requirements written based on the CDC grant requirements or are these requirements written based on current needs of Baltimore County Health Department?
   **Answer:** Both.

30. **Question:** Can you expand on requirement 2.024? Are you looking for the solution to provide these types of programs OOTB or are you looking to use the case management platform to deliver these programs specific to your current manual requirements?
   **Answer:** Looking for out of the box to meet the mandatory requirements.

31. **Question:** Requirement 2.013 - Would the users add/edit client's treatment information manually or does the system need to have the ability to import treatment and encounter data from electronic health record systems?
   **Answer:** Initially, users will add/edit client information manually with the desire to import from an internal EMR in the future.

32. **Question:** Are there any paper, fax, or scanning capture requirements? ICR? OCR?
   **Answer:** Refer to requirement 2.006 and 2.007.
33. **Question:** Requirement 3.017 - Can you give some examples of user defined fields that need to be added to the system?

**Answer:** The solution needs to be flexible as fields are identified and need to be added based on program or grant modifications, as expressed in 3.017.

34. **Question:** Does the case management system have any relation to the patient as a defendant/probationer in the legal system or is this strictly for medical treatment outcome tracking?

**Answer:** This solution will be used strictly for public health information.

35. **Question:** Should the software be compatible with all browsers and operating systems and mobile friendly also?

**Answer:** Yes.

36. **Question:** Have you included Records Management Requirements for the attachments to the case records?

**Answer:** Needs to follow BCDH Record Retention policy.

37. **Question:** We are interested in responding to RFP No. P-261 and had a question about our response. We are proposing (1) case management software solution but wanted to see if we could propose multiple options for implementing the software in Baltimore’s technical environment. To clarify, the options for implementing would be different consulting companies that implement the proposed software. That way if Baltimore chooses our proposed software solution, they could pick a consultant that best aligns with their needs.

**Answer:** Offerors should submit their most advantageous solution, however the County is looking to award to one vendor for a turnkey solution.

38. **Question:** We are a reseller of a COTS product that can be configured to meet your requirements. Is that acceptable or must we be the Developer of the solution.

**Answer:** A reseller is authorized but must be able to offer the full solution as required.

39. **Question:** Regarding Price Sheet Section C item 3: Can you describe the data conversion required? We don't see reference to this in the mandatory requirements.

**Answer:** The price sheet is generic and not specific to this solicitation. Please submit prices for solutions offered.

40. **Question:** Does the County have a preference for development methodology: waterfall, agile, hybrid?

**Answer:** All are acceptable methodologies. Please see Attachment H, Project Management section PM01.

41. **Question:** Regarding Price Sheet Section A: Can you provide the number of anticipated system users 1) on a regular basis (e.g., using the system 5-6 hours per day); 2) on a limited basis (e.g., using the system 1-2 hours per day; 3) on an occasional basis (e.g., using the system 1-2 hours per week).
42. **Question:** Since RFP forms must be printed and scanned, is the expectation that these documents will be in-line in the text and be numbered sequentially?

**Answer:** Submit all forms in the order requested in the RFP. It is okay if they are not paged number.

43. **Question:** Re: Incident Response, IR1 Describe your incident response plan from discovery until closure? (Incident Response Training, Incident Response Testing, Incident Handling) What type of incident does this refer to? Incursion attempts? Support incidents? Other?

**Answer:** Any incident in which your company has an incident response plan.

44. **Question:** RFP Section 14.4.1.3 requires Offeror's to "Provide the reference information as requested in General Condition 14." Please confirm this should reference General Condition 13, and not General Condition 14.

**Answer:** Amend General Condition 14.4.1.3 to read as follows:

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14.4.1.3 Provided the reference information as requested in General Condition 13.
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45. **Question:** Does any and all public bodies, subdivisions, school districts, community colleges, colleges and universities including non-public schools also apply to the same entities outside of Baltimore County and/or the state of Maryland?

**Answer:** Yes.

46. **Question:** Please confirm Offerors are only supposed to complete and return Attachment G - Software, Case Management System Requirements Vendor Response Matrix, NOT Attachment F - Mandatory Requirements.

**Answer:** Yes.

47. **Question:** Many of the requirements in Attachment G, detailed in Attachment F, would be well-illustrated with screenshots, diagrams, etc. Please confirm where vendors should provide this information.

**Answer:** In the technical portion of the proposal.

48. **Question:** Please confirm if Vendors are allowed to include their company's standard cover page and a table of contents at the beginning of their responses.

**Answer:** Yes.

49. **Question:** Per Amendment No. 1, released on June 22nd, vendors are expected to submit any exceptions or redlines to contracts/attachments/standards with their submissions. The current placement of content related to the acceptance to terms and conditions is in the Introduction and Executive Summary which is limited to 2 pages. Please confirm vendors should place redlines and/or exceptions as an appendix to the response submittal.

**Answer:** That is acceptable. The Introduction and Executive summary is limited to two pages in which you may note that your company has exceptions. Those exceptions do not have to be listed in the 2 page letter.

50. **Question:** Can the County provide a Word version of the RFP for use as a response template?
51. Question: For Amendment 1, the acknowledgement form came with the amendment and since amendments can occur till the previous day of the closing date for bid, how the acknowledgements of those amendments which are published after the submission of the proposal can be done?

Answer: Submit via email to bid@baltimorecountymd.gov with any additional documents or updated documents.

52. Question: Section 21.2: "The Offerors’ acceptance of, or deviations from, the form contract terms and conditions are considered during the evaluation and subsequent award". This means a form similar to Sample Contract PDF needed to be submitted with the response? If so, where can the contract form is provided? OR are we creating a Contract form from the sample form?

Answer: No. Sample and Mandatory Contract language has been provided. The County only needs to be notified of any exceptions.

53. Question: For the "Attachment -F MANDATORY REQUIREMENTS" – complete and return with your Technical response" is written in the document. For this, would you require Attachment G, "The Response Matrix is expected or still require Attachment F? " MANDATORY REQUIREMENTS’ document too completed and returned? If So, Would you provide a sample for this?

Answer: Attachment G is complimentary to Attachment F and is the form document used to confirm if requirements are met.

54. Question: Attachments A and B do not have any Agreeing parties Name or Sign. Also, Attachment A Describes as "Awarded Vendor”? Do these Attachments need to produced at the time RFP response time?

Answer: No.

55. Question: Taxpayer Identification Number (TIN) and Certification Form (Substitute for IRS Form W-9) - IF we have a Form W-9 is that a substitute for "Taxpayer Identification Number (TIN) and Certification Form" and not needed to submit Taxpayer Identification Number (TIN) and Certification Form?

Answer: A W9 will suffice.

56. Question: Also in Taxpayer Identification Number (TIN) and Certification Form there is a column stating as "Filing Status (Ownership) (LLC not acceptable)”? So, If we are an LLC and tax is filed regularly how do we proceed on this entry?

Answer: Below that statement is a selection of types of ownerships. Check one of the appropriate selections.

57. Question: Section 13.1 "Offerors may be required to furnish evidence of sufficient financial responsibility to fulfill the contract, and that they have, or can obtain the necessary equipment, manpower, and storage facility to ensure delivery within the parameters of the contract." Which all documents are expected? Could you please provide some example document names.

Answer: This is not required at time of bid. But could be requested if deemed necessary. If so, any documents required would be discussed at that time.
58. **Question:** Section 14.2.1.5 Jurisdiction in which firm is organized. Apart Good Standing documentation from the state, which is the document expected? If the Firm is incorporated in another state, would you require Articles of Incorporation?

**Answer:** No.

59. **Question:** The email submission of the document needed to be in which format? PDF or MS Word? Is there any formatting required specifically? Is there any Footer and Header requirement? Do you require any source file in MS word? If in MS word, when the forms/attachments from P-261 are filled, the formatting and the page numbers are not proper.

**Answer:** PDF is acceptable.

60. **Question:** The computation algorithms in sections C-F of the Price Sheet do not reflect typical pricing granularity. Can the pricing details be modified so long as the totals and grand totals are as requested?

**Answer:** Per the price sheet, Please provide any additional pricing matrix as required to outline and/or detail any item not listed on this price sheet. This includes any available or proposed options offered.

61. **Question:** Given the specified content, can the 2-pages limit for the Introduction and Executive Summary be increased to 3-4 pages?

**Answer:** No more than 3 pages.

62. **Question:** Is documentation available regarding HHS OD2A organizations and program workflow?

**Answer:** This information is not available at this time.

63. **Question:** Are BCoPD, BCoFD and BCDC deemed stakeholders and users of the CMS?

**Answer:** No.

64. **Question:** Will the County be able to provide the value of each criteria? As an example, we understand that providing a MBE/WBE is not required, but it is still being weighted. What value has been assigned to it?

**Answer:** No. However the criteria is in the order of importance.

65. **Question:** 14.1.5 Signed acknowledgement of all Addenda to the RFP: Does the County want all pages of addenda included in our response, or just the signed signature page?

**Answer:** The signed signature page will suffice.

66. **Question:** What percentage of the CDC grant can be utilized for software technology?

**Answer:** That information does not assist with the award of this agreement.

67. **Question:** Scope of Services; RFP Section 2.3, page 23: For project management best practices, will the County accept a framework aligned with a more recent version of the PMBOK (i.e., 5th or 6th edition)?

**Answer:** 6th Edition is current and we would want any offer to strive for the most recent edition. Amend General Condition 2.3 to read as follows:

> 2.3 The County requires project management best practices in the performance of all obligations and responsibilities, particularly those prescribed by the Project

68. **Question:** Attachment F - Mandatory Requirements 2.006: System must provide the ability to verify, add, edit, or delete client documents - such as consents, evaluations, assessments; How are these documents created so that editing can occur?

   **Answer:** Provide your solution’s capabilities.

69. **Question:** RFP Section 6. Term of Agreement - 6.1: you state, "the initial term of the contract will commence upon execution by the County and remain in effect until 5 years after final acceptance...." Does this mean that the contract begins upon Implementation?

   **Answer:** The contract will begin upon execution of any contract by the County. The initial term of the contract will be from execution to 5 years after final acceptance of the system implemented.

70. **Question:** RFP Section 6. Term of Agreement - 6.1: You further state, "The County reserves the right to renew the contract for up to 5 additional one-year renewal options" - does this then mean an overall total of 10 years?

   **Answer:** This means 5 years after the final acceptance of the implemented system, the County reserves the right to renew for five additional one-year terms. The full time frame would be based from final acceptance.

71. **Question:** Do you plan to provide a Project Manager for this project?

   **Answer:** Yes.

72. **Question:** Do you have an existing SLA in place with your current solution? If so, can you describe it and the criteria for responding and resolving issues reported?

   **Question:** Is there an SLA (Service Level Agreement) that is in place? If not, what are your support requirements?

   **Answer:** See Amendment 1 question 29.

73. **Question:** Our solution will propose a SaaS. Our provider will issue a Subscription Agreement and request that you sign it. Please advise us if you will have any issues signing this agreement. If so, please let us know and we share that agreement with you at the appropriate time.

   **Answer:** See Amendment 1 question number 7.

74. All other terms and conditions remain the same.