



R74443

June 19, 2015

Dear Sir/Madam:

Letter of Invitation to a Request for Proposals for Child and Family Services Case Management Database

The Government of Bermuda, through the Ministry of Community, Culture and Sports and The Department of Child and Family Services cordially invites you to participate in the above referenced bidding process in accordance with the accompanying documents.

Please find attached the Request for Proposal (RFP) for Child and Family Services Case Management Database which includes the instructions for the preparation and submission of the proposals, the rules that govern the bidding process.

Proposals must be submitted in a sealed envelope and clearly marked: "Request for Proposals for R74443 Child and Family Services Case Management Database" to the Department of Child and Family Services Hamilton, Bermuda.

All proposals must be received no later than 4pm July 10th, 2015. Late submission will not be accepted. This invitation and attached RFP are also being posted on the www.gov.bm website under procurement notices, along with any addendums.

All bidder questions or requests must be in writing and sent to both [Alfred Maybury \[amaybury@gov.bm\]\(mailto:amaybury@gov.bm\)](mailto:Alfred Maybury) and [Tekea Saunders \[tasaunders@gov.bm\]\(mailto:tasaunders@gov.bm\)](mailto:Tekea Saunders). We ask that you clearly state in the subject line "Request for Proposals for query R74443 Child and Family Services Case Management Database".

We appreciate your interest in this invitation, and look forward to receiving your proposal.

Yours Sincerely,

Alfred Maybury
Director of Child and Family Services



Ref: R74443

June 19, 2015

Request for Proposals (RFP)
For
Case Management Application

Executive Summary

- 1.1 The Government of Bermuda, Department of Child & Family Services (here after known as Department) is seeking information and creative ideas for solutions to replace the aging case management system that supports the administration of child and family welfare services.
- 1.2 The following outlines the process that will be followed by the Department to seek proposals from qualified vendors.

Summary of Key Dates

Publication of the RFP	June 19th, 2015
Cut off for questions	June 26th, 2015 (by 4:00 PM AST)
Vendor's Q & A published on www.gov.bm	July 3rd, 2015 (by 4:00 PM AST)
RFP due date	July 10th, 2015 (by 4:00 PM AST)
Shortlist	July 29th, 2015
Vendor Presentation	September 8th – September 11th, 2015
Final Vendor selection	September 25th, 2015
Tentative Go Live	July 2016

Department Contact Information

Alfred Maybury
Director of Child and Family Services
36 Victoria Street, Hamilton HM12, Bermuda
amaybury@gov.bm



Table of Content

Letter of Invitation to a Request for Proposals for a Case Management Application 1
 Executive Summary..... 2
 Summary of Key Dates 2
 Department Contact Information..... 2

Instructions to Bidders 4
 1. Submission Deadline..... 4
 2. Procedure for Submitting questions and enquires 4
 3. Submission Delivery 4
 4. Vendor Submission 5
 5. Pre-Submission Information 7
 6. Evaluation Process 8
 7. Basis of Award 8
 8. Protest Procedures 8
 9. Grounds for disqualification..... 9
 10. Negotiations 9
 11. Acceptance and Authority to cancel this RFP..... 9
 12. References 9
 13. Application Delivery 10
 14. Ownership 10
 15. General 10
 16. Public Access to Information..... 11

Appendix 1 Statement of Requirements 12
 Appendix 2 Case Management Application Requirements (Table yes/no) 14
 Appendix 3 Form of Agreement 20
 Appendix 4 Certificate Of Confirmation Of Non-Collusion 23
 Price Schedule Rates 24
 Evaluation Matrix 25



Instructions to Bidders

1. Submission Deadline

- 1.1 Vendor proposals must be received no later than July 10th, 2015, 4:00 pm AST.
- 1.2 Proposals received after the designated time of receipt will be considered as “NO BID” and “VOID.” The time stamp for proposals submitted electronically will be that of the Information Technology Office (ITO) mail server. It is the vendor’s responsibility to allow sufficient time for electronic transmission and delivery, especially in the case of large files.
- 1.3 Late proposals shall be rejected and returned to the vendor. The deadline is absolute and proposals received after the due date and time shall not be considered. Vendors must select a method of delivery that ensures proposals will be delivered to the correct location by the due date and time.

2. Procedure for Submitting questions and enquires

- 2.1 Questions pertaining to this RFP must be submitted IN WRITING via e-mail to only the contact person listed under “Department Contact Information.”
- 2.2 Please be as specific, citing the specification section/number where possible. Please submit all questions by the deadline using the subject line “**Question - Case Management Application - R74443**”
- 2.3 The Department of Child and Family will provide a written response to all pertinent questions in the form of an Addendum which will be posted at www.gov.bm under the Procurement Notices webpage.

3. Submission Delivery

- 3.1 Vendors may deliver submissions by e-mail or hard copy (3 copies) to:
E-mail: amaybury@gov.bm and tasaunders@gov.bm
Hard copy: Department of Child & Family Services
Attention: Alfred Maybury, Director of Child and Family Services
36 Victoria Street, Hamilton HM12, Bermuda
Normal Business hours are 9 a.m. to 4:45 p.m.
- 3.2 Information submitted via e-mail must have “**R74443**” in the subject line.
- 3.3 Information submitted in hard copy are to be triplicate (one original and two copies) and must be received in a sealed envelope/container plainly marked “**R74443**”.
- 3.4 All submissions become the property of the Government of Bermuda and will not be returned. All conditions contained in the RFP are considered accepted by the vendor in any information submitted.
- 3.5 All information submitted with the RFP will be kept confidential and access will be only by Government of Bermuda employees reviewing the RFP. The Government of Bermuda is not obliged to award orders or contracts to vendors based on the information received.
- 3.6 The solution is to be delivered as detailed in the attached:
 - Statement of Requirements document - (Appendix 1)
 - Case Management Application Requirements - (Appendix 2)



4. Vendor Submission

The solutions identified must address the requirements set out Appendix 1 - entitled “Child & Family Services – Requirements”.

4.1 Submissions may be from individual vendors or multi-vendor consortiums. In the case of vendor partnerships, one vendor must be clearly identified as the primary contractor, with all others being indicated as sub-contractors.

4.2 Submissions must include the following information:

- a) Each proposal must be accompanied by a Letter of Submission that:
 - Identifies the submitting vendor.
 - Includes a statement indicating which vendor, if multiple vendors are proposing jointly, intends to act as primary vendor for proposal evaluation questions and the delivery and maintenance of all post-proposal correspondence.
 - Includes a brief statement of the vendor’s understanding of the work to be done and a summary of the proposed features of the service solution.
 - Identifies the name, title address, telephone number, fax number, and email address of each person authorized by the vendor to contractually obligate the vendor.
 - Identifies the name, title address, telephone number, fax number, and email address of the vendor contact.
 - Includes a statement stating that the person signing the transmittal letter is authorized to legally bind the vendor.
 - Copy of the business incorporation, if incorporated.
 - Is signed by the person(s) authorized to contractually obligate the organization.
 - Acknowledges receipt of amendments to this RFP, if any
- b) **Company Information** - Including vendor qualifications and experience working on similar projects; as well as background information on the resources proposed to work on this project, including CV’s of project staff, key personnel proposed to work on the project. This information must be outlined in the Technical proposal.
- c) **Proposed Solution** -
 - A description of the proposed solution that will meet the requirements set out Appendix 1 entitled “Child & Family Services – Requirements”.
 - The description should set out the functions and features of the system and the processing logic. A schematic may prove useful with fulfilling this requirement. The description should also set out the proposed approach to training and installation.
- d) **Proposed Approach** - A description of the proposed approach for design, build, test, training and implementation of the proposed solution. The description should set out the methodology for analysis, documentation and verification of the requirements throughout the lifecycle.
- e) **Benefit Realization** - A description of the benefits to be realized from implementation of the proposed solution



- f) ***Project Plan and Methodology*** – This will show how the vendor proposes to approach the project and will comply with the cost schedule. Vendors must include as part of its approach a detailed Gantt chart outlining the following
- Detailed tasks and dependencies;
 - Task start and end dates;
 - Payment schedule

Vendors must describe the project methodology they will use for the system design and project management. This segment of the proposal should establish the appropriateness and value of the proposed methodology in relation to this RFP.

Vendors should identify other projects in which they have successfully used the methodology. These examples may be used as benchmarks for performance standards for deliverables in this project. Vendors should identify the potential risks and problems which, in their experience, occur on projects of this type. In addition, the Vendor should identify steps that can be taken by the Vendor or by the Government of Bermuda to mitigate risks.

- g) ***Cost of Acquisition*** - This refers to the total cost to procure, configure, develop and bring the new system online.
- It should include, but not be limited to a break-down of hardware, software, analysis, design and programming, training, project management and any other costs (expenses).
 - It should include, but not be limited to a breakdown of hourly/daily rate chargeable in Bermuda dollars, number of hours/days to completion and any other costs (expenses).
 - A payment schedule must be included that contains milestones and the associated payment amount.
 - All costs quoted should be “as landed” (i.e. including duty and shipping) costs in Bermuda Dollars.
 - In accordance with the Information Technology Office standard development contract, the first milestone and associated payment amount on the schedule must be for the Statement of Work.
- h) ***Annual Cost of Ownership*** - This should identify the annual recurring costs to operate the system. It should include, but may not be limited to a breakdown of software license fees and support contracts.
- i) ***Responsibilities of the Government of Bermuda*** - Involvement required of the Government of Bermuda in terms of staff, office space, training facilities, computer hardware, networking, cabling, or other supplies, etc.
- j) ***Certificate of Confirmation of Non-Collusion*** – Using the template titled CERTIFICATE OF CONFIRMATION OF NON-COLLUSION (Appendix 3) the vendor must acknowledge and sign the form.
- k) ***Summary of Proposal***



- Organization Data and References
- High Level Description of Solution
- Technology Platform
- Software
- Hosting (if web based solution) – if applicable
- Security
- Total \$ Cost of Acquisition
 - Hardware
 - Software
 - Conversion
 - Analysis/Design
 - Development
 - Testing
 - Vendor Project Management
 - Initial Statement of Work
 - Training
 - Travel

1. Other Costs or Expenses

4.1.1.1 Annual \$ Cost of Ownership. This should identify, where applicable, the annual recurring costs to manage the project. It should include, but may not be limited to, a breakdown of software license fees and support contracts. (See the price schedule of rates sheet)

4.1.1.2 Start/ Implementation Dates

4.1.1.3 Signed Certification of confirmation of non-collusion form

5. Pre-submission Information

5.1 All prospective vendors will be provided with this documentation and the opportunity to submit written inquiries to Department of Child & Family Services. Such inquiries will be published, without identifying the source, along with the Child & Family Services response.

5.2 Inquiries regarding this request for proposal must be made by email, with “**R74443 Inquiry**” in the subject line, by June 26th, 2015 to amaybury@gov.bm and tasaunders@gov.bm

5.3 Vendor Responsibility

It is the vendor’s responsibility to ensure its complete understanding of the requirements and instructions specified by the Government of Bermuda. In the event that clarification is required vendors should submit written inquiries as described in paragraph 5.2 above.

5.4 Amendments

- At any time prior to the close of the RFP, the Department of Child and Family Services may alter, amend, delete or add to, in whole or in part, any terms or provisions of this RFP. The Department of Child and Family Services will publish any such modification or amendment, revision or addenda on the website www.gov.bm via the Procurement Notice webpage.
- The proposals submitted to the Department of Child and Family Service will be evaluated in conjunction with other government departments based upon the standard Government of Bermuda evaluation. A qualitative evaluation of each proposal by the individual project team members will then be followed by moderation and consolidation resulting in a potential vendor selection.



Subsequently, client references will be taken up for the selected vendor which may result in the award of a contract.

6. Evaluation Process

6.1 Review Process/Evaluation Criteria

a) Proposal Responsiveness (Pass/Fail):

Required documentation: Proposals will be reviewed to determine if all required documentation was included with proposal submittal as described in the Evaluation Matrix (Exhibit 2) herein.

Proposals that fail to contain the required documents will be disqualified from further consideration.

b) Proposal Review and Evaluation

The proposals will be evaluated against the criteria and weighted scores will be applied as described in the Evaluation Matrix.

The Department of Child and Family may seek written clarification from any or all vendors in order to better understand and evaluate the proposed solution. This process may not be used as an opportunity to submit missing documentation or to make substantive revisions to the original proposal.

7 Basis of Award

7.1 Award will be based on the highest scoring proposal as determined by total points and rank using criteria and weights based on who has submitted all mandatory requirements.

7.2 Should the Department of Child and Family in its sole discretion determine that a secondary award is required; the award will be to the second highest ranked proposal.

7.3 Should either of the selected vendors fail to provide post award documents as required, the Department of Child and Family in its sole discretion, may withdraw the award recommendation, and select the next highest ranked proposal for award.

7.4 The Department of Child and Family reserves the right to accept an offer in full, or in part, or to reject all offers.

8. Protest Procedures

8.1 If an unsuccessful vendor wants to dispute the award recommendation, the protest must be submitted in writing to **the Director of Child and Family Services, Alfred Maybury** no later than ten calendar days after announcement of the successful vendor, detailing the grounds and providing all supporting information. Failure to submit a timely written protest to the Director of the Department of Child and Family Service will bar consideration of the protest.

8.2 The address for submitting a written protest is:



**The Department of Child and Family Services,
Alfred Maybury, Director of Child and Family Services,
36 Victoria Street, Hamilton HM12, Bermuda**

9 Grounds for disqualification

- Contact regarding this procurement with any Department of Child and Family Services official or employee or evaluation team member in any way other than specified in the RFP from the time of issuance of this solicitation until the end of the protest period.
- Any evidence of collusion, directly or indirectly, among vendors in regard to the amount, terms, or conditions of this proposal.
- The influencing of any Department of Child and Family Services staff member or evaluation team member throughout the solicitation process, including the development of specifications;
- Evidence of submitting incorrect information in the response to a solicitation or misrepresentation or failure to disclose material facts during the evaluation process
- In addition to violations of the guidelines, the following conduct may also result in disqualification:
 - Offering gifts or souvenirs, even of minimal value, to any Department of Child and Family Services officers or employees;
 - Existence of any lawsuit, unresolved contractual claim or dispute between vendors and the Department of Child and Family Services
 - Evidence of vendor's inability to successfully complete the responsibilities and obligations of the proposal.

10 Negotiations

The Government of Bermuda reserves the right to enter into discussions or to negotiate with a vendor as it sees fit, or with another vendor or vendors concurrently. In no event will the Government of Bermuda be required to enter into discussions or negotiations on similar or other terms or offer any modified terms to any other vendor prior to entering into a binding contract. The Government of Bermuda shall incur no liability to any vendor as a result of these discussions, negotiations or modifications.

11 Acceptance and Authority to cancel this RFP

The Government of Bermuda will not be obliged to accept the lowest price or any of the proposals submitted. Each vendor acknowledges and agrees that the Government of Bermuda will have no liability or obligation to any vendor, except to the party, if any, awarded a contract by the Government of Bermuda in its sole discretion and the Government of Bermuda shall be fully and forever released and discharged of all liability and obligation in connection with this Request for Proposal (RFP). The Government of Bermuda will not make public the vendor submissions and reserves the right to cancel this RFP without any obligation or reimbursement to vendors.

12 References

The Government of Bermuda reserves the right to require the vendor to submit such evidence of qualifications as it may deem appropriate. This evidence may be concerning financial, technical and other qualifications as well as the relevant experience and skills of the Vendor.



13 Application Delivery

The solution is considered delivered when the application is running in production mode and signed off by the Department of Child and Family Services and the Information Technology Office.

14 Ownership

- All data is owned expressly by the Government of Bermuda. The vendor can only take possession of relevant Government of Bermuda data when granted by the Department, and only for the purposes of data conversion, testing, and direct deployment tasks. Use of the data for purposes other than this is strictly prohibited and requires written authorization by the Government of Bermuda.
- Vendors should provide an explanation of ownership, licensing, and resale expectations of the application, source code, derivatives of source code, or Terms and Conditions.

15 General

- 15.1 The Department of **Child and Family Services** reserves the right to accept or reject any item or group(s) of items in response. The Department of **Child and Family Services** also reserves the right to waive any informality or irregularity in any proposal. Additionally, the Department of **Child and Family Services** may, for any reason, decide not to award an agreement as a result of this RFP or cancel the RFP. The Department of Child and Family Services shall not be obligated to respond to any proposal submitted, nor be legally bound in any manner by submission of the proposal.
- 15.2 All proposals will be considered final. No additions, deletions, corrections or adjustments will be accepted after **July 10th, 2015 at 4 pm AST**.
- 15.3 The Department of Child and Family Services shall not purchase services from any business owing delinquent taxes to the Bermuda Government.
- 15.4 The Department of Child and Family Services is not required to accept the lowest price proposal. Responses will be evaluated to determine the most advantageous proposal on a variety of factors including but not limited to price, implementation costs, design quality, features, and performance.
- 15.5 Final award shall be contingent upon reaching an agreement on software licensing and contractual terms, if applicable.
- 15.6 Upon awarding and acceptance of a contract for goods or services, monthly payments will be made by way of a Government of Bermuda purchase order. Payments will be authorized on invoices 30 days after receipt of the contracted goods or services. All responses must include any proposed variations to these standard payment terms for discussion and negotiation.
- 15.7 The Government of Bermuda shall not purchase services **from any business owing delinquent taxes to the Government of Bermuda**.



16 Public Access to Information

- 16.1 Any information collected or used by or on behalf of the Government of Bermuda under this solicitation document is subject to the Public Access to Information Act 2010 (“Act”). The information belongs to a class of information that might be made available to the general public unless it is contained in a record that is exempt from disclosure under the Act. Any questions regarding the collection, use, or disclosure of the information should be directed to the public authority that issued this solicitation document.

End of Instructions to Bidders



Appendix 1 Statement of Requirements

1 Primary Objectives

The primary objectives of the Department of Child and Family Service when replacing and modernizing their case management system is to improve the availability and quality of the information necessary to facilitate effective delivery of services that further protect children and strengthen families in need in Bermuda. Specific objectives for the solution include:

- Be compliant with Child Family standards, as outlined in the Children Act 1998, and the Amendment Act 2000.
- It must include Structured Decision Making Tool Integrate with Government of Bermuda IT Infrastructure.
- Be easy to use.
- Be assessable from mobile devices.
- Include seamless communication and sharing of data with related systems.
- Enable administrators to measure performance and quality by assessing the timeliness, efficiency, appropriateness, and effectiveness of services.
- Increase efficiency in the collection, reporting, and analysis of data at the program level.
- Improve program management, security, quality assurance, program services, and overall program integrity.
- Reduce the time and cost required to make modifications and enhancements to functionality.
- Identify a “Commercial off The Shelf” system that can be configured to meet the needs of Child & Family services with the minimum or no custom development.

2. Background

The Child and Family Services Department of the Ministry of Community, Culture and Sport mission is:

“To promote and protect the best interests and social well-being of children, adults, and families in order to enhance their social functioning and their quality of life”.

This includes receiving and investigating reports of child abuse and neglect, working to prevent domestic violence, helping families to stay together or reunite, and finding placements in foster or adoptive homes for children when needed.

The department objectives are:

- To minimize and eliminate those social, psychological, or other conditions known to cause or contribute to physical and emotional illness and sometimes socioeconomic problems.
- To promote growth and directional change in people, and their social situation.
- To assist in facilitating or improving social support for populations at risk.
- To provide treatment or curative services to address dysfunction and thereby assist people to function better in society.
- To restore individuals to a healthy condition or useful capacity.

Services are delivered through a centralized intake process that collects child abuse and neglect reports. These reports are triaged and services are delivered in 10 locations around Bermuda. Centralized intake, program administration, business management support (e.g. fiscal and budget management), and program



evaluation are housed in two offices located in Hamilton. IT Infrastructure is in place that provides access to servers and the Internet. It includes email and files share services.



Appendix 2 Case Management Application Requirements

As of January 2015, Child and Family Services have involvement with over 1150 cases through-out Bermuda. The main processes that must be addressed by a prospective solution include:

- Investigations of abuse or neglect in a year – 852 for 2014
- Reports from the field requiring further inquiry, but do not result in official investigation reports - 150
- Services or requesting assistance (i.e. asking Child & Family Services to assist with a removal or placement of a child) – 45
- Management of Foster Care – this include recruitment of foster families (28 annually) that result in placement of about 35 children annually.
- Management of Family Preservation – this includes the development and execution of Care plans for children and families - 295

Services and programs are supported by 105 employees of whom 80 are anticipated to use the new system with different user roles and responsibilities within the system. 60 of those employees are case workers with an average caseload of 40 families per worker. Families can include up to five individuals.

Child & Family Services currently uses Lotus Notes based case management system that was developed and installed in 1998, and can only accommodate a maximum of 20 users.

In response to the growing limitations and difficulty with sustaining support with the current system, Child & Family Services is planning to replace this system. The proposed new system must be compliant with Bermuda Legislation and Structure Decision Making Standard operating procedures that were adopted 2 years ago. A summary of the general requirements, as well as technology and integration needs are set out in the table below.

Business or Service Area	Current Process(es)	Summary of Future Needs
1. Person Detail/Person Management	Person Detail/Person Management captures client information and demographics to facilitate searching and case management activities.	The Person Detail/Person Management area will need to enable program users to enter and capture client information. Child & Family Services (DCFS) would like to enable reuse of information captured through the system whenever possible to avoid duplicate data entry by program staff. The solution must also streamline data entry and workflows to minimize time spent by users during data entry and proactively facilitate tasks.



Business or Service Area	Current Process(es)	Summary of Future Needs
9. Intake	The centralized intake triages Child Abuse and Neglect and Requests made to field officers for services, conducts background checks, releases case file information (Requests for Disclosure), and fulfills other requests for information from the public, law enforcement, other public institutions.	The Intake area will need to facilitate the Intake processes. DCFS would like to enable reuse of information captured through the system whenever possible to avoid duplicate data entry by program staff. The solution must also streamline data entry and workflows to minimize time spent by users during data entry and proactively facilitate tasks. The Intake Process must apply the Structured Decision Making rules to guide triage and next steps.
10. Investigation and Assessments	DCFS workers assess the safety of the children identified in the Intake and make a determination for each allegation in the report.	<p>The Investigation and Assessment area will need to facilitate the Investigation and Assessment processes, would like to enable reuse of information captured through the system whenever possible to avoid duplicate data entry by program staff. The solution must also streamline data entry and workflows to minimize time spent by users during data entry and proactively facilitate tasks.</p> <p>The proposed Case Management system must enable management of potential outcomes of each assessment. The System must track the disposition of each allegation. DCFS case management system is based on a Structured Decision Making (SDM) Tool, and any recommended approach would need to reflect the policies and functions of the SDM model.</p>
11. Case Management	Case Management involves the management of activities throughout the life of the case. The functions of Case Management include: Case Initiation, Case Planning, Family	The Case Management area will need to facilitate the Case Management processes. DCFS would like to enable reuse of information captured through the system whenever possible to



Business or Service Area	Current Process(es)	Summary of Future Needs
	<p>Group Decision Making, In-Home and Out-of-Home Services, Placement and Placement Tracking, Legal Activities, and Adoption. Once an Investigation has been completed and it has been determined the family is in need of services, a Service Case is opened and plans are developed as identified in the Service Strategy for In-Home and/or Out-of-Home services.</p>	<p>avoid duplicate data entry by program staff. DCFS would also like to allow for integration with a flexible workflow management tool to allow workflows to be tailored by user role to best support program staff and their various roles within the Department. The solution must also streamline data entry and workflows to minimize time spent by users during data entry and proactively facilitate tasks. The solution must support: Removal & Replacement, Outcome Management and Periodic Reviews.</p> <p>The system will need to interface with the Financial Assistance applications, The Bermuda Courts applications and The Bermuda Housing Corporation applications. Therefore, the solution must include a means for interfacing with other departmental systems. This means sending or receiving Alerts for common accounts/cases.</p>
<p>12. Permanency (Adoption, Guardianship)</p>	<p>DCFS recruit and license foster parents to provide substitute homes for children placed away from their parents or guardians. Specialists also license specialized and therapeutic family foster homes for children with special needs and child placement agencies, such as adoption agencies. Additionally, specialists coordinate reunification services, which include Family Group Decision-making Meetings, counseling, parenting education classes, in-home services, mentoring, respite care, supervised visits, and</p>	<p>The Permanency area will need to facilitate the Permanency processes. The solution must also streamline data entry and workflows to minimize time spent by users during data entry and proactively facilitate tasks. The solution must facilitate a reminder process to set schedules for reviews.</p> <p>The system must have the ability to upload and attach information from a third party application for DCFS clients.</p>



Business or Service Area	Current Process(es)	Summary of Future Needs
<p>13. COMMUNITY PARTNERS</p>	<p>transportation.</p> <p>Primary functions include:</p> <ul style="list-style-type: none"> • To identify children who are likely to remain in foster care until 18 years of age and to help these children make the transition to self-sufficiency and receive the education, training, and services necessary to obtain employment. • To provide personal and emotional support to youth aging out of foster care, through mentors and the promotion of interactions with dedicated adults. • To provide financial, housing, counseling, employment, education, and other appropriate support and services to former foster care youth between 18 and 21 years of age to complement their own efforts to achieve self-sufficiency, and to assure that program participants recognize and accept their personal responsibility in preparing for the transition from adolescence to adulthood. • To make vouchers for education and training available, including post-secondary training and education to youths who have aged out of foster care. 	<p>The solution will need to effectively and efficiently facilitate the ability for community partners to communicate their functions in relation to case management. The solution must also streamline data entry and workflows to minimize time spent by users during data entry and proactively facilitate tasks.</p>
<p>14. Licensing/Foster Care Management</p>	<p>Licensing/Foster Care Management encompasses licensing community members applying to become foster care providers as well as licensing providers – private, non-profit or for-profit organizations. Organizations can provide both</p>	<p>The Licensing/Foster Care Management area will need to facilitate the Licensing/Provider Management processes. The solution must also streamline data entry and workflows to minimize time spent by users during data entry and proactively facilitate</p>



Business or Service Area	Current Process(es)	Summary of Future Needs
	residential and support services such as counseling, and drug testing. In addition, this functional area includes contract monitoring.	tasks. The solution must include a facility to log complaints concerning Foster Care providers.
15. Staff Management	Staff Management related to collecting information about staff, both internal and external to DCFS. This information is used to grant security access to staff enabling those with the right to know the ability to inquire or update information about children and families being served, assign cases, and assist works in the management of their workload.	To facilitate the Staff Management processes, the solution must integrate with Microsoft Active Directory for access management service through the Government Network.
16. Produce Program, reports	DCFS is required to produce several program reports on a regular basis.	The proposed solution will need to provide robust and flexible reporting that facilitates management and administrative reporting. The solution should support both user reports to support job responsibilities, management reports to monitor workload and business processes, and administrative reports to fulfill program-reporting needs. .
17. Produce program notices and forms	DCFS currently uses several notices and forms to support business processes.	Draft requirements for notices and forms are included in Appendix C. As part of this project, the Department of Child and Family Services would like to implement a new tool to support flexible and user-friendly notices and forms that would allow users to tailor notices, as needed, according to policies and procedures. More information on the tool is included below.
18. Workflow and Task Management	There are several roles involved with the administration of DCFS and business processes, each with unique responsibilities and workflow needs.	The solution should include a workflow and task management tool to support the unique needs of the various roles and responsibilities. The tool should be user friendly and flexible to



Business or Service Area	Current Process(es)	Summary of Future Needs
		allow for future changes to easily be applied by non-technical staff.
19. IT Infrastructure	The Bermuda Government supports systems based on Microsoft servers, SQL and Sharepoint. As well as IBM Websphere and DB2.	The proposed solution must be based on the Microsoft or IBM standards. The solution must be delivered over a standard Internet connection, browser and mobile devices capabilities. Cloud solutions will be considered.



Phase II – These aspects of the system should be considered in the overall design but will not be included in the Phase I scope of work.

<p>20. Eligibility Determination</p>	<p>Eligibility Determination includes the gathering, verifying, and recording of the information used to determine whether a child is eligible for reimbursement in accordance with DCFS standards.</p>	<p>To facilitate the eligibility determination processes, the solution must interface with the Financial Assistance System.</p>
<p>21. Financial Management</p>	<p>The processes related to:</p> <p>Contract Support – The entry and approval of contracts, which are agreements between the Department of Child and Family Services [DCFS] and service providers/vendors including in-home and out-of-home service providers.</p> <p>Budget – Tracking the allocations for Emergency Assistance, Chafee funds, any Social Security income, and other grants and contracts.</p> <p>Accounts Payable – The process involved in the generation of payments from DCFS to the vendors or clients. Accounts Payable includes service request and authorization/approval, invoicing/billing the Department of Child and Family Services generation, and payment validation.</p> <p>Claim Matching Funds – The process involved in the claiming and management of funds to offset the cost of care incurred by the Department of Child and Family Services for children and families served by the DCFS.</p> <p>Accounts Receivable – The process involved in the monitoring, tracking, and</p>	<p>The [LEGACY CPS] currently provides sufficient financial management functionality to support current Health Human Services [HHS] business needs. The proposed solution will need to ensure current capabilities are met, and ideally, exceeded.</p>



	<p>collecting of money or funds owed to the Department for services provided to a child or family. Accounts Receivables may include the following activities:</p> <ul style="list-style-type: none">• Processing, tracking and collecting of overpayments to payees.• Processing child-specific trust fund revenues to offset the Department of Child and Family Services care expenses, including obtaining and processing Child Support funds and payments or other funds collected for custodial children served by DCFS.• Obtaining and processing License Fees and Adoptions Request Fees.• Receipt and processing of cash or checks mailed to DCFS.• Functionality to enter repayment plans.• Functionality to write off uncollectible monies.	
--	---	--



Appendix 3 Form of Agreement

Form of Agreement

Ref: PROPOSAL to implement a case management/document management and workflow application for the Department of Child and Family Services.

TO: Ministry of Community, Culture and Sports, Department of Child and Family Services.

1. We confirm that we, the undersigned, are conducting business as a proper legal entity and are not delinquent in making payments for outstanding debts for Government receivables such as Social Insurance contributions, Payroll Tax and Public Works (formerly Works & Engineering) fees
2. We confirm that we have submitted a bona fide Proposal intended to be competitive and we have not fixed or adjusted our Price by or under or in accordance with any agreement or arrangement with any other bidder.
3. Have examined the request for proposal information and Addenda Nos. _____ inclusive for the execution of the above named *Service*, we, the undersigned, offer to provide the *Service* in accordance with the Instructions to Proponents, Appendices and Exhibits (herein called the *Proposal documents*).
4. We undertake, if our proposal is accepted, to commence the Works as soon as is reasonably possible after the receipt of the notice to commence, and to provide the Works comprised in the *Contract Documents* for the duration stated in the Contract
5. We confirm that our proposal shall remain open for acceptance by the Government of Bermuda for a period of **90 calendar days** from the date of this undertaking and we shall not withdraw this proposal during *this period*.
6. Unless and until a formal Agreement is prepared and executed this proposal together with your written acceptance thereof, shall constitute a binding contract between us.
7. We understand that you are not bound to accept the lowest or any tender that you may receive.
8. I/We consent to the collection and use of the information I/we give to the Government of Bermuda in response to the solicitation document and agree to waive any right to challenge any decision made by the Government to disclose the information.

Dated this _____ day of _____, 2015

(Signature) _____

(Name in block letters) _____

(Title) _____

Duly authorized to sign tenders for and on behalf of:

(Company) _____

(Address) _____



Appendix 4 CERTIFICATE OF CONFIRMATION OF NON-COLLUSION

Notes for the tenderer/bidder

The essence of Open Tendering is that the Government of Bermuda shall receive bona fide competitive tenders from all persons tendering. In recognition of this principle, all companies submitting a tender will be required, by way of the signature of the Company Principle, state their agreement to the statements below, which indicates that the tender has been submitted without any form of collusion.

The Certificate of Confirmation of Non-Collusion is a mandatory requirement from all bidders. Any bids submitted which do not include a signed copy of the Certificate will be wholly rejected and will not be included in the evaluation process.

If it is later found that the undertakings made below have been breached at any stage of the process, the bidder will be expelled from the process immediately. In the event that this is discovered after a contract award, legal action may be taken against the bidder and/or any party involved in the matter.

False submissions may also exclude the bidder, and any other person or company involved in collusion, from bidding for future contracts tendered by the Government of Bermuda.

Confirmation of non-collusion

I/We certify that this is a bona fide tender, intended to be competitive and that I/We have not fixed or adjusted the amount of the tender or the rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person.

I/We confirm that we have not received any additional information, other than that contained within the tender pack, or supplementary information provided to all bidders.

I/We also certify that I/We have not done and undertake that I/We will not do at any time any of the following acts:

- (a) communicating to a person other than the tender administrator the amount or approximate amount of my/our proposed tender (other than in confidence in order to obtain quotations necessary for the preparation of the tender for insurance) or
- (b) entering into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any tender to be submitted; or
- (c) offering or agreeing to pay or give or paying any sum of money, inducement, gift /hospitality or valuable consideration directly or indirectly to any person in relation to this tender.

Signed

(1) _____ Title _____ Date _____

(2) _____ Title _____ Date _____

for and on behalf of (*Company*)



Price Schedule Rates		
Total Cost of Acquisition		Total
Item	Description/Details (Please provide details of milestones, etc.)	Cost
Hardware		
Software		
Analysis/Design		
Development		
Testing		
Vendor Project Management		
Initial Statement of Work		
Conversion		
Training		
Travel		
Expenses		
Total		
Total Cost of Ownership		Total
Item	Description/Details	Cost
Software License Fees		
Support Contract Fees		
Other Recurring Costs or Expenses		
Security		
Annual Total Cost		

Bidder's Signature

Signature: _____

Name in block letters: _____

ON BEHALF OF
 Company: _____

DATED: _____



Tender Ref:	Department of Child and Family Services			
			SC	
ITEM	CRITERIA	WEIGHTING	Tender 1	Tender 2
1	Experience & Capability:		<i>Supplier Name</i>	<i>Supplier Name</i>
1.1	Does the bidder clearly demonstrate the ability to deliver the requirements of the tender?		0.00	0.00
1.2	Did the bidder offer evidence of experience with projects of a similar technical level?		0.00	0.00
1.3	Did the bidder offer sufficient evidence of experience with completing projects within timescales and budgets?		0.00	0.00
1.4	Is the bidder able to complete the work within the required timescales?		0.00	0.00
1.5	Does the bidder state that they have sufficient, suitably experienced resources available?		0.00	0.00
1.6	Does the bidder have a good track record in Health & Safety?		0.00	0.00



2.1 (non construction)	5 = lowest bid, 4 = next lowest etc until 0 = most expensive
2.1 (construction)	5 = equal to or within 15% of estimate, 4 = between 16% to 30% (over or under) of estimate , 3 = between 30% to 40% (over or under) of estimate, 2 = between 40% and 50% (over or under) of estimate, 0 = over 50% more or less than estimate
2.2	Following financial checks, i.e. checking a bank reference, the following scores should be awarded - 5 = all financial checks sound, 4 = minor financial concerns, 1 = major financial concerns, 0 = no evidence provided / evidence of severe financial instability
2.3	Following checks with Social Insurance and Tax Commissioner check the following scores should be awarded - 5 = all financial checks sound, 4 = minor financial concerns, 1 = major financial concerns, 0 = no evidence provided / evidence of severe financial instability
3.1	5 should be awarded to the bidder with the highest percentage of the workforce being Bermudian, down to 0 for the least percentage
3.2	5 = substantive evidence that apprenticeships/training positions in place, 3 = some evidence of apprenticeships/training in place, 0 = no evidence of apprenticeships/training in place
3.3	5 = yes, 0= no
3.4	5 = graduated from Incubator, 3 = other business skills training evident, 0 = no business skills training evident