

WRITTEN RESPONSE SCORING
February 27-
RFP #2323-833
ORIA Case Management and Database Solution

Vendor Name: CoreSphere, LLC

Evaluator Number: WE-1

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score based on the criteria only.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- We would prefer that you leave a comment for each question scored, briefly explaining why you assigned that particular score.
- You may discuss the proposals among the evaluation team, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something that was not asked for in the Solicitation.

Scoring of Proposals

The following available points will be assigned to the proposal for evaluation purposes:

Section 5 – Management Response	34 points
Section 6 – Methodology Response	50 points
Section 7 – Technical Proposal	144 points

If you have questions, please direct them to Nicole Kahle, Solicitation Coordinator, Nicole.Kahle@dshs.wa.gov. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Score	Description	Discussion
90-100% of available points	Exceptional	Clearly superior to that which is average.
70-80%	Above Average	Better than that which is average.
50-60%	Average	Baseline score for each item with adjustments based upon the evaluator's interpretation of the Bidder's response.
30-40%	Below Average	Substandard to that which is average.
10-20%	Failing	Non-responsive or clearly inadequate to that which is average.
0%	No Experience	Response shows no experience in this skill or capability.

Evaluator Scoresheet for RFP #2323-833

You will be evaluating three parts of the bidder's submission: Section 5. Bidder Qualifications and Experience (Management Response), Section 6. Bidder's Proposed Approach (Methodology Response), and Section 7 Bidder's Solution (Technical Response). If a question requires Bidders to submit additional documents, they will be included in an attached document. Any other information submitted that is not included inside Attachment D is not required for Evaluators to review.

5. BIDDER QUALIFICATIONS AND EXPERIENCE (Management Response)		34 MAX POINTS	SCORE
A	Please describe the experiences, skills and qualifications your organization possesses that are relevant to your ability to perform the Contract that is the subject of this Solicitation. Please include all information that demonstrates your organization's ability to fulfill ORIA's business needs for a case management and database system. Please include any relevant experience that distinguishes your organization or makes your proposed Solution and your services uniquely qualified for the Contract.	6	6
	COMMENT: Bidder offers an exceptional response.		
B	Please provide an example of collaboration during the installation and initial launch of a complex system with an organization. How did you partner with the organization's staff, coordinate with diverse stakeholders with complex and competing needs and priorities, and handle securely sensitive data? How did you respond to challenges that popped up during the project and/or after the system's launch?	4	4
	COMMENT: Bidder offers a exception response.		
C	Detail an experience working with an agency to configure or customize the Solution to meet their needs. What was your approach and what was the result? What lessons did you learn that you would use to ensure the Solution meets or exceeds ORIA's business needs?	4	4
	COMMENT: Bidder offers an exceptional response.		

	D	Please provide the names of the key team members, their positions and/or positions needing to be hired, including any subcontractors you will assign to this Contract. Provide their proposed roles and responsibilities and information describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.	2	2
		COMMENT: Bidder provided an exceptional response.		
	E	Describe your detailed experience, approach and model for supporting DSHS through the development, initial launch, and iterative enhancements to final development. Describe how you have served diverse clients and users in the past. What were your assumptions related to this experience? How did your approach work? Please describe any challenges you faced and how you overcame them.	6	5
		COMMENT: Bidder provided an above average response. Bidder did use “Montana” instead of WA.		
	F	Please describe your experience in analyzing, validating and documenting requirements and for creating required outputs. As shared in Attachment F: ORIA Programs Overview, there are multiple programs and services which need to be holistically incorporated into the Solution. What has been your approach in working with organizations to understand, confirm and incorporate requirements in projects similar to ORIA’s with multiple diverse stakeholders, users, programs and services?	6	5
		COMMENT: Bidder provides an above average response.		
	G	Describe any past experiences you have had working with an organization to develop a system with configuration capabilities, which could nimbly respond with minimal vendor support in a fluid environment, such as when services, policies, needs or Congressional/Legislative mandates change.	6	5
		COMMENT: Bidder providers an above average response.		

6.	BIDDER PROPOSED APPROACH (Methodology Response)		50 MAX POINTS	SCORE
A	Quality Assurance: Please describe your approach to quality assurance and your QA practices from initiation through operations for ensuring the Solution is maintained and operates according to Service Level Agreements. Please detail: a. your methods for assuring that your services and deliverables are provided in accordance with high quality standards and for immediately correcting any deficiencies. b. your approach and mechanisms for identifying, tracking and reporting defects and issues? c. process for monitoring Solution performance, including that of the end user experience? d. how do you make sure your products meet standards? What are your standards and what do you do if things go wrong?		8	8
	COMMENT:	Bidder provides an exceptional response.		
B	Service Level Agreement: The Bidder is responsible for meeting Service Level Agreements (SLA) and supporting ORIA during disaster recovery and disaster recovery exercises including recovering the Solution according to DSHS RTO/RPO requirements. When working on a new contract, please describe your approach and recommendations for: a. Developing the most cost-effective Service Level Agreement (SLA) that meets business needs and contractual requirements. b. Ensuring your Solution remains operational while meeting all security requirements through timely upgrades, enhancements and fixes. c. Providing information, planning and releasing new versions, bugs fixes, and updates, including during planned and unplanned outages and disaster recovery.		6	5
	COMMENT:	Bidder provides an above average response.		
C	Project Management Services-- Project Timeline: Describe your approach to providing project management services to customize, implement, and launch an ORIA case management Solution, including for the: • Timeline/schedule from initiation, through implementation, testing, training and evaluation/close-out for the Solution to meet the needs outlined in this RFP.		16	14

		<ul style="list-style-type: none"> • Work with ORIA to prioritize features, integrate configuration or customization changes into the Solution, create and deploy training and other key project tasks. • Business needs documentation and your implementation plan to ensure the Solution meets and/or exceeds Scope needs and contractual requirements. • Collaboration with ORIA and contracted service providers to customize the Solution as business needs require or desire. • Testing plan and approach for the Solution that addresses unit testing, user acceptance testing (UAT), regression testing and integration testing. • Your Go Live assessment and planning services for a successful launch, including ensuring appropriate and effective training for each user group. • Evaluation to ensure the Solution meets ORIA and contracted service providers' needs and to develop a plan to adjust with additional customization, if needed. • Describe your assumptions associated with the project management services. 		
		<div>COMMENT:</div> <div>Bidder has an exceptional response.</div>		
	D	Ongoing Support Services: Describe your recommended, detailed approach and support model for providing maintenance and ongoing support services for the new Solution. Describe all assumptions related to your approach for ongoing support services.		
		<div>COMMENT:</div> <div>Bidder provides a better than average response.</div>	6	5
	E	Cost Efficiency: Please describe the measures you employ to assure that your services and deliverables are provided in a cost-effective manner that is consistent with quality outcomes and fair employment practices.		
		<div>COMMENT:</div> <div>Bidder has an exceptional response.</div>	6	5
	G	Holistic Approach to Data (Input & Output) question: ORIA has multiple programs detailed in Attachment F that provide a continuum of services to support eligible clients from arrival to naturalization (generally five years of	8	8

		<p>services). It needs a Solution that takes a holistic approach to data collection that is not siloed within any one program, while at the same time, recognizes that each ORIA program has differing goals and purposes that require capturing and tracking unique data specific to that program. Describe the proposed Solution's capabilities/functionality to be able to:</p> <ol style="list-style-type: none"> Achieve a holistic approach to capturing client and services data and information that is shared and/or similar among multiple programs in an efficient and intuitive fashion. Disaggregate data to isolate views of clients and services that is specific to a program and/or provider, if/when needed. 		
		<p>COMMENT: Bidder provides an exceptional response.</p>		
7.	BIDDER SOLUTION (Technical Response)			
			144 MAX POINTS	SCORE
	A	<p>Your Solution: Describe in detail the Solution you are proposing for ORIA to use under the resulting contract, including, but not limited to the:</p> <ol style="list-style-type: none"> Proposed software (name, type, version, release number, etc.). Training provided to users of the Solution. Instructions, documentation and tools provided to ensure end-users will be able to successfully operate the Solution independently on an ongoing basis after training. Base functionality and optional add-on modules. Bidder's Solution and user technical support services. Open source or third-party products and services are used or could be used in conjunction with the Solution (including identifying separately in the proposal any associated costs). End-user license agreement information, including what's required to access and use all products, including third-party products/services. <p>Additional Solution functionality, products or services that RFP specifications or business needs do not address but are necessary to implement and support this Solution and meet ORIA programmatic needs.</p>		
		<p>COMMENT: Bidder provides an exceptional response.</p>	16	16

	B	<p>Users Information: ORIA contracts with 80+ statewide contracted service providers to deliver ORIA programs and services to eligible individuals and families. ORIA staff and contracted service providers' staff will be the primary users of the proposed Solution. Some contracted service providers may hold multiple contracts to provide more than one ORIA program or service. Many contracted service providers work with the same individuals and families simultaneously or consecutively to provide services along the ORIA program continuum.</p> <ul style="list-style-type: none"> a. Describe how the proposed Solution meets the need for a streamlined, interactive, user-friendly approach for users. b. Describe features in the Solution, if any, that minimize time spent on data entry and that maximize value to support users in their delivery of ORIA services. c. What type of features are available to achieve a holistic approach to capturing data for all programs and services within ORIA's portfolio, while at the same time are also able to track different services under different programs? For example, all ORIA programs need to capture client demographic information (sharing functionality). However, the use of demographic info for client eligibility may differ for same client across ORIA programs (program-specific functionality). How will your Solution features and functionality allow for both the forest and the trees view of ORIA program and services? d. What types of features are available for ORIA program managers and contracted service providers to communicate and coordinate around direct client services? What functionality facilitates collaboration between diverse users, while also ensuring confidential data is isolated and accessible to only approved users? e. Describe the Solution's ability to distinguish contracted service providers and their staff when: <ul style="list-style-type: none"> I. Multiple contracted service providers manage cases within the same ORIA program or service, II. Individual contracted service providers manage multiple ORIA services, III. Multiple staff work for the same contracted service provider in individual programs or services, <p>Individual contracted service provider staff also work within multiple ORIA programs or services.</p>	22	22
		<p>COMMENT: Bidder provides an exceptional response.</p>		
	C	<p>Multiple Users: ORIA needs a case management system that allows for diverse users to be simultaneous using the Solution.</p> <ul style="list-style-type: none"> a. Describe how the Solution manages multiple users accessing the Solution at the same time including what the limitations are regarding simultaneous users, how and why those limitations exist and what abilities ORIA administration would have to configure user limits. Include if the Solution can scale up or down the number of 	4	4

		<p>simultaneous users without affecting performance, latency response times, network connectivity and/or requirements users must meet to have Solution functionality.</p> <p>Use the table in below in addition to details in a narrative.</p>		
		<p>COMMENT: Bidder provides an above average response.</p>		
D		<p>Data migration: Contracted service providers currently use individual Excel worksheets to document client referrals, benefits, services and other programmatic data. Some program data is also documented in the current solution MyRIA and eJAS, which will be sunsetted by this Solution. Describe:</p> <ul style="list-style-type: none"> a. Your recommendations for tools and methods you will use for migrating, validating and integrating data from and to legacy systems with the new Solution. b. You will work with ORIA to determine the scope of ORIA's data migration needs. c. Your Solution will migrate existing Excel data and data found in MyRIA and eJAS into it as needed by ORIA, including your recommended schedule for migrating data from 21 separate programs into the Solution. d. Contracted service providers will have the ongoing option to upload an Excel file with required data, populating existing database fields into the Solution. <p>All assumptions related to your approach for data integration services.</p>	20	20
		<p>COMMENT: Bidder provides an exceptional response.</p>		
E		<p>Eligibility, Intake & Assessment and Self-Sufficiency Plans: Potential clients (individuals and families) may be referred to or walk-in to an ORIA Service Provider for services, and their eligibility must be determined before ORIA programs' services can be provided. An initial Intake and Assessment is required to determine barriers and needs to ensure that the appropriate services are provided and that clients can be reassessed to support emerging needs to stabilize individuals /families and help them thrive in Washington State. Describe your Solution's capabilities, functionality, and streamlined process to:</p> <ul style="list-style-type: none"> a. Reduce or eliminate duplication of efforts to determine eligibility for various programs with the same or different eligibility criteria. b. Capture an initial intake and eligibility and develop an assessment for individuals and/or families that can be shared and revised among multiple service providers working with same clients. 	6	5

		Develop an Individual and/or Family Self-Sufficiency Plan that can be used, viewed, edited and historically tracked.		
		COMMENT: Bidder provides an above average response.		
F		Clients and Services Case Management: From your understanding of the RFP and ORIA programs and services, describe the case management features in the proposed Solution and how they would meet or exceed ORIA and contracted service providers' business needs.		
		COMMENT: Bidder provides an exceptional response	12	12
G		Data Management: ORIA needs a Solution that can manage a large amount of data, including private and personal identifying information within the case management system. Please describe in detail your Solution's: <ul style="list-style-type: none"> a. Capacity to store data, documents, reports, etc., including, but not limited to: <ul style="list-style-type: none"> I. Client demographic information. II. Programs in which clients are participating. III. Contracted service providers. IV. Service details. b. Ability to track and display detailed data per retention period and historic high-level data in perpetuity. c. Ability to analyze data for performance measurement, assessments and evaluations, such as the #/% of clients eligible for services vs. receiving services (a desired enhancement). Ability to extract data from the software and store it in data warehouses. The vendor must be able to supply Solution diagrams, field names, data column definitions, and a data dictionary.		
		COMMENT: Bidder provides an above average. response.	14	12
H			8	8

		COMMENT: Bidder has an exceptional response.		
I	<p>First year functionality schedule: ORIA seeks a Solution that allows for baseline functionality as soon as feasible, ramping up to full implementation by the end of Year 1 of the contract. Please describe in detail:</p> <ul style="list-style-type: none"> a. Your recommendations regarding the sample agile schedule below. b. What functionality could look like in the first, second and third quarters of the 12-month contract. c. Your estimate on how soon the Solution could be by at least one ORIA program with baseline functionality vs used from a holistic, combined, ORIA programs approach. d. Your realistic schedule and approach for bringing at least one program online. e. Your realistic schedule of increasing functionality and your assumptions associated with it for bringing all programs into the Solution. <p>Recommendations for prework ORIA could undertake in advance of the contract to expedite the process for bringing programs into the Solution.</p> <p><i>Example agile schedule for bringing ORIA data and users into the Solution.</i></p> <ul style="list-style-type: none"> a. Customizing solution back end to match existing data. b. Customizing solution front end to match existing data. c. Migrating existing data program by program. d. Programs start entering in new data into the solution once their old data has been migrated. e. Advanced Search functionality. f. Reporting. g. Dashboards. h. Workflows. 		12	11
		COMMENT: Bidder provided an exceptional response.		
J	<p>Flexibility to Modify Solution: ORIA is likely to add new program(s) or services in the future to meet different emerging client populations and needs. In addition, modifications to existing program and services may be required with a relatively short turnaround time due to new or changing state and federal policies, funding and eligibility mandates. Describe the Solution's scalability and ability to handle growth.</p>		12	11

		<p>a. Can ORIA configure the Solution, including setting up new programs within it? If so, describe in detail the Solutions ability to be configured or scaled by ORIA as State business or technical demands and needs change.</p> <p>b. Describe the timeline for configuration and the level of Bidder support needed. In addition, describe what elements in the Solution are configurable in the future by ORIA without bidder technical support?</p> <p>c. What can be handled by ORIA staff through configuration with no extra cost and what modifications to the Solution would require Bidder assistance and/or an extra cost?</p> <p>Describe the Bidder's services, capability, limitations, timeframe, and process to:</p> <p>d. Train and authorize ORIA staff to be able to make changes (add, edit, delete) to required data sets on our own, and/or</p> <p>e. To have Bidder's staff make the required changes needed by ORIA.</p> <p><i>NOTE: Extra points if ORIA staff can be trained to make Solution changes on our own versus external process that requires additional steps/time/costs, etc. to be able to implement needed changes.</i></p>		
		<p>COMMENT: Bidder provides an exceptional response.</p>		
	K	<p>Invoicing, Budget Allocation, Expenditure Tracking by Contract Period: ORIA's programs is supported through a mix of state and federal funding, and payments made to service providers can be processed monthly or quarterly during a state or federal fiscal year. Please describe the proposed Solution's capabilities and functionality to capture, enable and track service levels data, which can be used to support invoices, budget development and expenditure reviews outside of the Solution based on ad hoc timeframes?</p>		
		<p>COMMENT: Bidder provides an exceptional response.</p>	4	4

L	<p>Data security: ORIA service providers work with eligible clients who are in need of high confidentiality and robust private personal information protection (for examples refugee minors, health screening, etc.). The Apparent Successful Bidder must pass a Security Design Review prior to signing the awarded contract to ensure the Solution can meet security requirements.</p> <ul style="list-style-type: none"> a. Describe your detailed approach for configuring or customizing the Solution to meet the Agency's security requirement needs found in Standard 141.10 (https://ocio.wa.gov/policies) of the Office of the Chief Information Officer for the state of Washington, and of the DSHS Information Security Policy and Standards Manual. b. Describe all assumptions related to your approach for meeting the Agency's Security Design Review requirements. 	4	3
	<p>COMMENT: Bidder provides an above average response.</p>		
M	<p>Service Requirements:</p> <ul style="list-style-type: none"> a. Describe in detail how your Solution meets our minimum service requirements found in Attachment A. b. If ORIA staff and/or contracted service providers experience an internet access outage, describe how the Solution or Bidder's support staff would assist in uploading data collected during the internet outage. c. What is your process for recovering lost data? d. How would the Solution or Bidder's support staff assist in the recovery of any lost data? <p>Describe in detail how Bidder would respond to a data breach? What type of assistance would be provided to DSHS?</p>	10	8
	<p>COMMENT: Bidder provides an above average response.</p>		

WRITTEN RESPONSE SCORING
February 27-
RFP #2323-833
ORIA Case Management and Database Solution

Vendor Name: CoreSphere, LLC

Evaluator Number: 2

General Guidelines:

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- We would prefer that you leave a comment for each question scored, briefly explaining why you assigned that particular score.
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0%	No Experience	Response shows no experience in this skill or capability.

Evaluator Scoresheet for RFP #2323-833

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5. BIDDER QUALIFICATIONS AND EXPERIENCE (Management Response)		34 MAX POINTS	SCORE
A	Please describe the experiences, skills and qualifications your organization possesses that are relevant to your ability to perform the Contract that is the subject of this Solicitation. Please include all information that demonstrates your organization's ability to fulfill ORIA's business needs for a case management and database system. Please include any relevant experience that distinguishes your organization or makes your proposed Solution and your services uniquely qualified for the Contract.	6	6
	COMMENT: Question answered in great detail with lots of information regarding the readiness of both the company and the solution.		
B	Please provide an example of collaboration during the installation and initial launch of a complex system with an organization. How did you partner with the organization's staff, coordinate with diverse stakeholders with complex and competing needs and priorities, and handle securely sensitive data? How did you respond to challenges that popped up during the project and/or after the system's launch?	4	2
	COMMENT: Question answered satisfactorily.		
C	Detail an experience working with an agency to configure or customize the Solution to meet their needs. What was your approach and what was the result? What lessons did you learn that you would use to ensure the Solution meets or exceeds ORIA's business needs?	4	3
	COMMENT: Question answered satisfactorily. Bonus for detailed lessons learned.		

	D	Please provide the names of the key team members, their positions and/or positions needing to be hired, including any subcontractors you will assign to this Contract. Provide their proposed roles and responsibilities and information describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.	2	2
		COMMENT: Question answered in detail.		
	E	Describe your detailed experience, approach and model for supporting DSHS through the development, initial launch, and iterative enhancements to final development. Describe how you have served diverse clients and users in the past. What were your assumptions related to this experience? How did your approach work? Please describe any challenges you faced and how you overcame them.	6	6
		COMMENT: Question answered in great detail. Several quality examples of diverse clients, and detailed description of approach.		
	F	Please describe your experience in analyzing, validating and documenting requirements and for creating required outputs. As shared in Attachment F: ORIA Programs Overview, there are multiple programs and services which need to be holistically incorporated into the Solution. What has been your approach in working with organizations to understand, confirm and incorporate requirements in projects similar to ORIA's with multiple diverse stakeholders, users, programs and services?	6	4
		COMMENT: Question answered in detail		
	G	Describe any past experiences you have had working with an organization to develop a system with configuration capabilities, which could nimbly respond with minimal vendor support in a fluid environment, such as when services, policies, needs or Congressional/Legislative mandates change.	6	2
		COMMENT: Question partially answered. I very much liked the bullet points of options that ORIA could change but the question also specifically asked for past experiences and none were provided.		

6.	BIDDER PROPOSED APPROACH (Methodology Response)		50 MAX POINTS	SCORE
A	Quality Assurance: Please describe your approach to quality assurance and your QA practices from initiation through operations for ensuring the Solution is maintained and operates according to Service Level Agreements. Please detail: a. your methods for assuring that your services and deliverables are provided in accordance with high quality standards and for immediately correcting any deficiencies. b. your approach and mechanisms for identifying, tracking and reporting defects and issues? c. process for monitoring Solution performance, including that of the end user experience? d. how do you make sure your products meet standards? What are your standards and what do you do if things go wrong?		8	6
	COMMENT:	Question answered in detail		
B	Service Level Agreement: The Bidder is responsible for meeting Service Level Agreements (SLA) and supporting ORIA during disaster recovery and disaster recovery exercises including recovering the Solution according to DSHS RTO/RPO requirements. When working on a new contract, please describe your approach and recommendations for: a. Developing the most cost-effective Service Level Agreement (SLA) that meets business needs and contractual requirements. b. Ensuring your Solution remains operational while meeting all security requirements through timely upgrades, enhancements and fixes. c. Providing information, planning and releasing new versions, bugs fixes, and updates, including during planned and unplanned outages and disaster recovery.		6	3
	COMMENT:	Question answered satisfactorily		
C	Project Management Services-- Project Timeline: Describe your approach to providing project management services to customize, implement, and launch an ORIA case management Solution, including for the: • Timeline/schedule from initiation, through implementation, testing, training and evaluation/close-out for the Solution to meet the needs outlined in this RFP.		16	8

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		<div>COMMENT:</div> <div>Question answered satisfactorily</div>		
	D	Ongoing Support Services: Describe your recommended, detailed approach and support model for providing maintenance and ongoing support services for the new Solution. Describe all assumptions related to your approach for ongoing support services.		
		<div>COMMENT:</div> <div>Question answered satisfactorily</div>	6	3
	E	Cost Efficiency: Please describe the measures you employ to assure that your services and deliverables are provided in a cost-effective manner that is consistent with quality outcomes and fair employment practices.		
		<div>COMMENT:</div> <div>Question answered satisfactorily</div>	6	3
	G	Holistic Approach to Data (Input & Output) question: ORIA has multiple programs detailed in Attachment F that provide a continuum of services to support eligible clients from arrival to naturalization (generally five years of	8	7

		<p>services). It needs a Solution that takes a holistic approach to data collection that is not siloed within any one program, while at the same time, recognizes that each ORIA program has differing goals and purposes that require capturing and tracking unique data specific to that program. Describe the proposed Solution's capabilities/functionality to be able to:</p> <ol style="list-style-type: none"> Achieve a holistic approach to capturing client and services data and information that is shared and/or similar among multiple programs in an efficient and intuitive fashion. Disaggregate data to isolate views of clients and services that is specific to a program and/or provider, if/when needed. 		
		<p>COMMENT: Question answered in great detail. Bonus points for attached pictures.</p>		
7.	BIDDER SOLUTION (Technical Response)			
			144 MAX POINTS	SCORE
	A	<p>Your Solution: Describe in detail the Solution you are proposing for ORIA to use under the resulting contract, including, but not limited to the:</p> <ol style="list-style-type: none"> Proposed software (name, type, version, release number, etc.). Training provided to users of the Solution. Instructions, documentation and tools provided to ensure end-users will be able to successfully operate the Solution independently on an ongoing basis after training. Base functionality and optional add-on modules. Bidder's Solution and user technical support services. Open source or third-party products and services are used or could be used in conjunction with the Solution (including identifying separately in the proposal any associated costs). End-user license agreement information, including what's required to access and use all products, including third-party products/services. <p>Additional Solution functionality, products or services that RFP specifications or business needs do not address but are necessary to implement and support this Solution and meet ORIA programmatic needs.</p>	16	12
		<p>COMMENT: Question answered in detail.</p>		

	B	<p>Users Information: ORIA contracts with 80+ statewide contracted service providers to deliver ORIA programs and services to eligible individuals and families. ORIA staff and contracted service providers' staff will be the primary users of the proposed Solution. Some contracted service providers may hold multiple contracts to provide more than one ORIA program or service. Many contracted service providers work with the same individuals and families simultaneously or consecutively to provide services along the ORIA program continuum.</p> <ol style="list-style-type: none"> Describe how the proposed Solution meets the need for a streamlined, interactive, user-friendly approach for users. Describe features in the Solution, if any, that minimize time spent on data entry and that maximize value to support users in their delivery of ORIA services. What type of features are available to achieve a holistic approach to capturing data for all programs and services within ORIA's portfolio, while at the same time are also able to track different services under different programs? For example, all ORIA programs need to capture client demographic information (sharing functionality). However, the use of demographic info for client eligibility may differ for same client across ORIA programs (program-specific functionality). How will your Solution features and functionality allow for both the forest and the trees view of ORIA program and services? What types of features are available for ORIA program managers and contracted service providers to communicate and coordinate around direct client services? What functionality facilitates collaboration between diverse users, while also ensuring confidential data is isolated and accessible to only approved users? Describe the Solution's ability to distinguish contracted service providers and their staff when: <ol style="list-style-type: none"> Multiple contracted service providers manage cases within the same ORIA program or service, Individual contracted service providers manage multiple ORIA services, Multiple staff work for the same contracted service provider in individual programs or services, <p>Individual contracted service provider staff also work within multiple ORIA programs or services.</p>	22	20
		<p>COMMENT: Question answered in great detail. Bonus points for the added screenshot examples.</p>		
	C	<p>Multiple Users: ORIA needs a case management system that allows for diverse users to be simultaneous using the Solution.</p> <ol style="list-style-type: none"> Describe how the Solution manages multiple users accessing the Solution at the same time including what the limitations are regarding simultaneous users, how and why those limitations exist and what abilities ORIA administration would have to configure user limits. Include if the Solution can scale up or down the number of 	4	2

		<p>simultaneous users without affecting performance, latency response times, network connectivity and/or requirements users must meet to have Solution functionality.</p> <p>Use the table in below in addition to details in a narrative.</p>		
		<p>COMMENT: Question answered satisfactorily.</p>		
D		<p>Data migration: Contracted service providers currently use individual Excel worksheets to document client referrals, benefits, services and other programmatic data. Some program data is also documented in the current solution MyRIA and eJAS, which will be sunsetted by this Solution. Describe:</p> <ul style="list-style-type: none"> a. Your recommendations for tools and methods you will use for migrating, validating and integrating data from and to legacy systems with the new Solution. b. You will work with ORIA to determine the scope of ORIA's data migration needs. c. Your Solution will migrate existing Excel data and data found in MyRIA and eJAS into it as needed by ORIA, including your recommended schedule for migrating data from 21 separate programs into the Solution. d. Contracted service providers will have the ongoing option to upload an Excel file with required data, populating existing database fields into the Solution. <p>All assumptions related to your approach for data integration services.</p>	20	12
		<p>COMMENT: Question answered satisfactorily. Bonus points for added pictures.</p>		
E		<p>Eligibility, Intake & Assessment and Self-Sufficiency Plans: Potential clients (individuals and families) may be referred to or walk-in to an ORIA Service Provider for services, and their eligibility must be determined before ORIA programs' services can be provided. An initial Intake and Assessment is required to determine barriers and needs to ensure that the appropriate services are provided and that clients can be reassessed to support emerging needs to stabilize individuals /families and help them thrive in Washington State. Describe your Solution's capabilities, functionality, and streamlined process to:</p> <ul style="list-style-type: none"> a. Reduce or eliminate duplication of efforts to determine eligibility for various programs with the same or different eligibility criteria. b. Capture an initial intake and eligibility and develop an assessment for individuals and/or families that can be shared and revised among multiple service providers working with same clients. 	6	6

		Develop an Individual and/or Family Self-Sufficiency Plan that can be used, viewed, edited and historically tracked.		
	COMMENT:	Question answered in great detail. Bonus points for added pictures.		
	F	Clients and Services Case Management: From your understanding of the RFP and ORIA programs and services, describe the case management features in the proposed Solution and how they would meet or exceed ORIA and contracted service providers' business needs.	12	12
	COMMENT:	Question answered with an insane amount of detail. Bonus for attached pictures.		
	G	Data Management: ORIA needs a Solution that can manage a large amount of data, including private and personal identifying information within the case management system. Please describe in detail your Solution's: <ul style="list-style-type: none"> a. Capacity to store data, documents, reports, etc., including, but not limited to: <ul style="list-style-type: none"> I. Client demographic information. II. Programs in which clients are participating. III. Contracted service providers. IV. Service details. b. Ability to track and display detailed data per retention period and historic high-level data in perpetuity. c. Ability to analyze data for performance measurement, assessments and evaluations, such as the #/% of clients eligible for services vs. receiving services (a desired enhancement). Ability to extract data from the software and store it in data warehouses. The vendor must be able to supply Solution diagrams, field names, data column definitions, and a data dictionary.	14	8
	COMMENT:	Question answered satisfactorily. Bonus point for attached picture.		
	H		8	6

		COMMENT:	Question answered in detail. Bonus point for added pictures.		
I	<p>First year functionality schedule: ORIA seeks a Solution that allows for baseline functionality as soon as feasible, ramping up to full implementation by the end of Year 1 of the contract. Please describe in detail:</p> <ol style="list-style-type: none"> Your recommendations regarding the sample agile schedule below. What functionality could look like in the first, second and third quarters of the 12-month contract. Your estimate on how soon the Solution could be by at least one ORIA program with baseline functionality vs used from a holistic, combined, ORIA programs approach. Your realistic schedule and approach for bringing at least one program online. Your realistic schedule of increasing functionality and your assumptions associated with it for bringing all programs into the Solution. <p>Recommendations for prework ORIA could undertake in advance of the contract to expedite the process for bringing programs into the Solution.</p> <p><i>Example agile schedule for bringing ORIA data and users into the Solution.</i></p> <ol style="list-style-type: none"> <i>Customizing solution back end to match existing data.</i> <i>Customizing solution front end to match existing data.</i> <i>Migrating existing data program by program.</i> <i>Programs start entering in new data into the solution once their old data has been migrated.</i> <i>Advanced Search functionality.</i> <i>Reporting.</i> <i>Dashboards.</i> <i>Workflows.</i> 			12	7
		COMMENT:	Question answered satisfactorily. Bonus point for included picture.		
J	<p>Flexibility to Modify Solution: ORIA is likely to add new program(s) or services in the future to meet different emerging client populations and needs. In addition, modifications to existing program and services may be required with a relatively short turnaround time due to new or changing state and federal policies, funding and eligibility mandates. Describe the Solution's scalability and ability to handle growth.</p>			12	7

		<p>a. Can ORIA configure the Solution, including setting up new programs within it? If so, describe in detail the Solutions ability to be configured or scaled by ORIA as State business or technical demands and needs change.</p> <p>b. Describe the timeline for configuration and the level of Bidder support needed. In addition, describe what elements in the Solution are configurable in the future by ORIA without bidder technical support?</p> <p>c. What can be handled by ORIA staff through configuration with no extra cost and what modifications to the Solution would require Bidder assistance and/or an extra cost?</p> <p>Describe the Bidder's services, capability, limitations, timeframe, and process to:</p> <p>d. Train and authorize ORIA staff to be able to make changes (add, edit, delete) to required data sets on our own, and/or</p> <p>e. To have Bidder's staff make the required changes needed by ORIA.</p> <p><i>NOTE: Extra points if ORIA staff can be trained to make Solution changes on our own versus external process that requires additional steps/time/costs, etc. to be able to implement needed changes.</i></p>		
		<p>COMMENT: Question answered in detail.</p>		
	K	<p>Invoicing, Budget Allocation, Expenditure Tracking by Contract Period: ORIA's programs is supported through a mix of state and federal funding, and payments made to service providers can be processed monthly or quarterly during a state or federal fiscal year. Please describe the proposed Solution's capabilities and functionality to capture, enable and track service levels data, which can be used to support invoices, budget development and expenditure reviews outside of the Solution based on ad hoc timeframes?</p>		
		<p>COMMENT: Question answered satisfactorily.</p>	4	2

L	<p>Data security: ORIA service providers work with eligible clients who are in need of high confidentiality and robust private personal information protection (for examples refugee minors, health screening, etc.). The Apparent Successful Bidder must pass a Security Design Review prior to signing the awarded contract to ensure the Solution can meet security requirements.</p> <ul style="list-style-type: none"> a. Describe your detailed approach for configuring or customizing the Solution to meet the Agency's security requirement needs found in Standard 141.10 (https://ocio.wa.gov/policies) of the Office of the Chief Information Officer for the state of Washington, and of the DSHS Information Security Policy and Standards Manual. b. Describe all assumptions related to your approach for meeting the Agency's Security Design Review requirements. 	4	3
	<p>COMMENT: Question answered in detail</p>		
M	<p>Service Requirements:</p> <ul style="list-style-type: none"> a. Describe in detail how your Solution meets our minimum service requirements found in Attachment A. b. If ORIA staff and/or contracted service providers experience an internet access outage, describe how the Solution or Bidder's support staff would assist in uploading data collected during the internet outage. c. What is your process for recovering lost data? d. How would the Solution or Bidder's support staff assist in the recovery of any lost data? <p>Describe in detail how Bidder would respond to a data breach? What type of assistance would be provided to DSHS?</p>	10	8
	<p>COMMENT: Question answered in detail. Bonus point for added picture.</p>		

WRITTEN RESPONSE SCORING
February 27-
RFP #2323-833
ORIA Case Management and Database Solution

Vendor Name: CoreSphere, LLC

Evaluator Number: 3

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score based on the criteria only.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- We would prefer that you leave a comment for each question scored, briefly explaining why you assigned that particular score.
- You may discuss the proposals among the evaluation team, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something that was not asked for in the Solicitation.

Scoring of Proposals

The following available points will be assigned to the proposal for evaluation purposes:

Section 5 – Management Response	34 points
Section 6 – Methodology Response	50 points
Section 7 – Technical Proposal	144 points

If you have questions, please direct them to Nicole Kahle, Solicitation Coordinator, Nicole.Kahle@dshs.wa.gov. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Score	Description	Discussion
90-100% of available points	Exceptional	Clearly superior to that which is average.
70-80%	Above Average	Better than that which is average.
50-60%	Average	Baseline score for each item with adjustments based upon the evaluator's interpretation of the Bidder's response.
30-40%	Below Average	Substandard to that which is average.
10-20%	Failing	Non-responsive or clearly inadequate to that which is average.
0%	No Experience	Response shows no experience in this skill or capability.

Evaluator Scoresheet for RFP #2323-833

You will be evaluating three parts of the bidder's submission: Section 5. Bidder Qualifications and Experience (Management Response), Section 6. Bidder's Proposed Approach (Methodology Response), and Section 7 Bidder's Solution (Technical Response). If a question requires Bidders to submit additional documents, they will be included in an attached document. Any other information submitted that is not included inside Attachment D is not required for Evaluators to review.

5. BIDDER QUALIFICATIONS AND EXPERIENCE (Management Response)		34 MAX POINTS	SCORE
A	Please describe the experiences, skills and qualifications your organization possesses that are relevant to your ability to perform the Contract that is the subject of this Solicitation. Please include all information that demonstrates your organization's ability to fulfill ORIA's business needs for a case management and database system. Please include any relevant experience that distinguishes your organization or makes your proposed Solution and your services uniquely qualified for the Contract.	6	4
	COMMENT: The response is above average, focusing on public sector experience. Salesforce platform with no vendor lock in. Flexibility and benefits are clearly outlined.		
B	Please provide an example of collaboration during the installation and initial launch of a complex system with an organization. How did you partner with the organization's staff, coordinate with diverse stakeholders with complex and competing needs and priorities, and handle securely sensitive data? How did you respond to challenges that popped up during the project and/or after the system's launch?	4	3
	COMMENT: The DOL collaboration example was excellent and above average.		
C	Detail an experience working with an agency to configure or customize the Solution to meet their needs. What was your approach and what was the result? What lessons did you learn that you would use to ensure the Solution meets or exceeds ORIA's business needs?	4	2
	COMMENT: The response adequately responds to the question, but isn't overly detailed. Creating a Refugee Management System for North Dakota and assumes it will be similar for WA.		

	D	Please provide the names of the key team members, their positions and/or positions needing to be hired, including any subcontractors you will assign to this Contract. Provide their proposed roles and responsibilities and information describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.	2	2
		COMMENT: Highly detailed and above average response.		
	E	Describe your detailed experience, approach and model for supporting DSHS through the development, initial launch, and iterative enhancements to final development. Describe how you have served diverse clients and users in the past. What were your assumptions related to this experience? How did your approach work? Please describe any challenges you faced and how you overcame them.	6	4
		COMMENT: The response is above average and utilizes the ND Refugee program to describe the system functionality to address diverse client base and broad needs.		
	F	Please describe your experience in analyzing, validating and documenting requirements and for creating required outputs. As shared in Attachment F: ORIA Programs Overview, there are multiple programs and services which need to be holistically incorporated into the Solution. What has been your approach in working with organizations to understand, confirm and incorporate requirements in projects similar to ORIA's with multiple diverse stakeholders, users, programs and services?	6	3
		COMMENT: The response adequately responds to the question.		
	G	Describe any past experiences you have had working with an organization to develop a system with configuration capabilities, which could nimbly respond with minimal vendor support in a fluid environment, such as when services, policies, needs or Congressional/Legislative mandates change.	6	3
		COMMENT: CareSphere Accelerator functionality allows for configuration by ORIA. Response is not overly detailed, but adequate.		

6.	BIDDER PROPOSED APPROACH (Methodology Response)		50 MAX POINTS	SCORE
A	Quality Assurance: Please describe your approach to quality assurance and your QA practices from initiation through operations for ensuring the Solution is maintained and operates according to Service Level Agreements. Please detail: a. your methods for assuring that your services and deliverables are provided in accordance with high quality standards and for immediately correcting any deficiencies. b. your approach and mechanisms for identifying, tracking and reporting defects and issues? c. process for monitoring Solution performance, including that of the end user experience? d. how do you make sure your products meet standards? What are your standards and what do you do if things go wrong?		8	5
	COMMENT:	The response is well thought out and detailed. Above average.		
B	Service Level Agreement: The Bidder is responsible for meeting Service Level Agreements (SLA) and supporting ORIA during disaster recovery and disaster recovery exercises including recovering the Solution according to DSHS RTO/RPO requirements. When working on a new contract, please describe your approach and recommendations for: a. Developing the most cost-effective Service Level Agreement (SLA) that meets business needs and contractual requirements. b. Ensuring your Solution remains operational while meeting all security requirements through timely upgrades, enhancements and fixes. c. Providing information, planning and releasing new versions, bugs fixes, and updates, including during planned and unplanned outages and disaster recovery.		6	3
	COMMENT:	The response adequately responds to all aspects of the question.		
C	Project Management Services-- Project Timeline: Describe your approach to providing project management services to customize, implement, and launch an ORIA case management Solution, including for the: • Timeline/schedule from initiation, through implementation, testing, training and evaluation/close-out for the Solution to meet the needs outlined in this RFP.		16	8

		<ul style="list-style-type: none"> • Work with ORIA to prioritize features, integrate configuration or customization changes into the Solution, create and deploy training and other key project tasks. • Business needs documentation and your implementation plan to ensure the Solution meets and/or exceeds Scope needs and contractual requirements. • Collaboration with ORIA and contracted service providers to customize the Solution as business needs require or desire. • Testing plan and approach for the Solution that addresses unit testing, user acceptance testing (UAT), regression testing and integration testing. • Your Go Live assessment and planning services for a successful launch, including ensuring appropriate and effective training for each user group. • Evaluation to ensure the Solution meets ORIA and contracted service providers' needs and to develop a plan to adjust with additional customization, if needed. • Describe your assumptions associated with the project management services. 		
		<p>COMMENT: Strong response. I appreciate the overview of metrics-driven decision making to identify areas of improvement. I would have liked a bit more information on training approaches. Would have liked a better understanding of the timeline for each stage.</p>		
	D	<p>Ongoing Support Services: Describe your recommended, detailed approach and support model for providing maintenance and ongoing support services for the new Solution. Describe all assumptions related to your approach for ongoing support services.</p>		
		<p>COMMENT: The response clearly and adequately outlines ongoing support services.</p>	6	3
	E	<p>Cost Efficiency: Please describe the measures you employ to assure that your services and deliverables are provided in a cost-effective manner that is consistent with quality outcomes and fair employment practices.</p>		
		<p>COMMENT: The response adequately answers the question.</p>	6	3
	G	<p>Holistic Approach to Data (Input & Output) question: ORIA has multiple programs detailed in Attachment F that provide a continuum of services to support eligible clients from arrival to naturalization (generally five years of</p>	8	6

		<p>services). It needs a Solution that takes a holistic approach to data collection that is not siloed within any one program, while at the same time, recognizes that each ORIA program has differing goals and purposes that require capturing and tracking unique data specific to that program. Describe the proposed Solution's capabilities/functionality to be able to:</p> <ol style="list-style-type: none"> Achieve a holistic approach to capturing client and services data and information that is shared and/or similar among multiple programs in an efficient and intuitive fashion. Disaggregate data to isolate views of clients and services that is specific to a program and/or provider, if/when needed. 		
		<p>COMMENT: Strong response with an overview of the data model that addresses the unique needs of human services. Programs/ Services within Programs/ Modules, etc.</p>		
7.	BIDDER SOLUTION (Technical Response)			
			144 MAX POINTS	SCORE
	A	<p>Your Solution: Describe in detail the Solution you are proposing for ORIA to use under the resulting contract, including, but not limited to the:</p> <ol style="list-style-type: none"> Proposed software (name, type, version, release number, etc.). Training provided to users of the Solution. Instructions, documentation and tools provided to ensure end-users will be able to successfully operate the Solution independently on an ongoing basis after training. Base functionality and optional add-on modules. Bidder's Solution and user technical support services. Open source or third-party products and services are used or could be used in conjunction with the Solution (including identifying separately in the proposal any associated costs). End-user license agreement information, including what's required to access and use all products, including third-party products/services. <p>Additional Solution functionality, products or services that RFP specifications or business needs do not address but are necessary to implement and support this Solution and meet ORIA programmatic needs.</p>	16	10
		<p>COMMENT: Very detailed response with examples of relevant features. It is apparent the bidder has a strong base knowledge of ORIA's CMS needs.</p>		

	B	<p>Users Information: ORIA contracts with 80+ statewide contracted service providers to deliver ORIA programs and services to eligible individuals and families. ORIA staff and contracted service providers' staff will be the primary users of the proposed Solution. Some contracted service providers may hold multiple contracts to provide more than one ORIA program or service. Many contracted service providers work with the same individuals and families simultaneously or consecutively to provide services along the ORIA program continuum.</p> <ol style="list-style-type: none"> Describe how the proposed Solution meets the need for a streamlined, interactive, user-friendly approach for users. Describe features in the Solution, if any, that minimize time spent on data entry and that maximize value to support users in their delivery of ORIA services. What type of features are available to achieve a holistic approach to capturing data for all programs and services within ORIA's portfolio, while at the same time are also able to track different services under different programs? For example, all ORIA programs need to capture client demographic information (sharing functionality). However, the use of demographic info for client eligibility may differ for same client across ORIA programs (program-specific functionality). How will your Solution features and functionality allow for both the forest and the trees view of ORIA program and services? What types of features are available for ORIA program managers and contracted service providers to communicate and coordinate around direct client services? What functionality facilitates collaboration between diverse users, while also ensuring confidential data is isolated and accessible to only approved users? Describe the Solution's ability to distinguish contracted service providers and their staff when: <ol style="list-style-type: none"> Multiple contracted service providers manage cases within the same ORIA program or service, Individual contracted service providers manage multiple ORIA services, Multiple staff work for the same contracted service provider in individual programs or services, <p>Individual contracted service provider staff also work within multiple ORIA programs or services.</p>	22	14
		<p>COMMENT: An excellent response which details the bidder's clear understanding of ORIA's work and how the features of their system will meet ORIA's needs.</p>		
	C	<p>Multiple Users: ORIA needs a case management system that allows for diverse users to be simultaneous using the Solution.</p> <ol style="list-style-type: none"> Describe how the Solution manages multiple users accessing the Solution at the same time including what the limitations are regarding simultaneous users, how and why those limitations exist and what abilities ORIA administration would have to configure user limits. Include if the Solution can scale up or down the number of 	4	2

		<p>simultaneous users without affecting performance, latency response times, network connectivity and/or requirements users must meet to have Solution functionality.</p> <p>Use the table in below in addition to details in a narrative.</p>		
		<p>COMMENT: The response adequately answers the question.</p>		
D	<p>Data migration: Contracted service providers currently use individual Excel worksheets to document client referrals, benefits, services and other programmatic data. Some program data is also documented in the current solution MyRIA and eJAS, which will be sunsetted by this Solution. Describe:</p> <ul style="list-style-type: none"> a. Your recommendations for tools and methods you will use for migrating, validating and integrating data from and to legacy systems with the new Solution. b. You will work with ORIA to determine the scope of ORIA's data migration needs. c. Your Solution will migrate existing Excel data and data found in MyRIA and eJAS into it as needed by ORIA, including your recommended schedule for migrating data from 21 separate programs into the Solution. d. Contracted service providers will have the ongoing option to upload an Excel file with required data, populating existing database fields into the Solution. <p>All assumptions related to your approach for data integration services.</p>		20	11
	<p>COMMENT: A clear and detailed response. One assumption is that data will be cleansed and standardized prior to migration.</p>			
E	<p>Eligibility, Intake & Assessment and Self-Sufficiency Plans: Potential clients (individuals and families) may be referred to or walk-in to an ORIA Service Provider for services, and their eligibility must be determined before ORIA programs' services can be provided. An initial Intake and Assessment is required to determine barriers and needs to ensure that the appropriate services are provided and that clients can be reassessed to support emerging needs to stabilize individuals /families and help them thrive in Washington State. Describe your Solution's capabilities, functionality, and streamlined process to:</p> <ul style="list-style-type: none"> a. Reduce or eliminate duplication of efforts to determine eligibility for various programs with the same or different eligibility criteria. b. Capture an initial intake and eligibility and develop an assessment for individuals and/or families that can be shared and revised among multiple service providers working with same clients. 		6	5

		Develop an Individual and/or Family Self-Sufficiency Plan that can be used, viewed, edited and historically tracked.		
	COMMENT:	An exceptionally strong response. I like the Eligibility Rules Engine and the inclusion of Exhibit 14. The intake wizard and other program wizards are also a great features.		
	F	Clients and Services Case Management: From your understanding of the RFP and ORIA programs and services, describe the case management features in the proposed Solution and how they would meet or exceed ORIA and contracted service providers' business needs.	12	9
	COMMENT:	Exceptionally strong response with functionality to include "CareSphere offers various methods to collect and group detailed information about Clients, Households, Relationships, Applications, Eligibility, Referrals, Applications, Benefits, Enrolled Provider Services, Documents, Interactions, and much more to create a Digital Case File". The Digital Case File visual is great and would be accessible and easy to use for providers. The interactive Map of Providers is a great feature. A number of excellent features that would meet ORIA's needs. The document collection feature with the ability to collect electronic signatures is another innovative feature.		
	G	Data Management: ORIA needs a Solution that can manage a large amount of data, including private and personal identifying information within the case management system. Please describe in detail your Solution's: <ul style="list-style-type: none"> a. Capacity to store data, documents, reports, etc., including, but not limited to: <ul style="list-style-type: none"> I. Client demographic information. II. Programs in which clients are participating. III. Contracted service providers. IV. Service details. b. Ability to track and display detailed data per retention period and historic high-level data in perpetuity. c. Ability to analyze data for performance measurement, assessments and evaluations, such as the #/% of clients eligible for services vs. receiving services (a desired enhancement). Ability to extract data from the software and store it in data warehouses. The vendor must be able to supply Solution diagrams, field names, data column definitions, and a data dictionary.	14	8
	COMMENT:	Strong response that provides a visual (Schema Builder) that provides a data relationship diagram as well as flexibility in controlling data management features.		
	H		8	5

		COMMENT: Strong and detailed response with relevant examples of dashboards.		
I	<p>First year functionality schedule: ORIA seeks a Solution that allows for baseline functionality as soon as feasible, ramping up to full implementation by the end of Year 1 of the contract. Please describe in detail:</p> <ul style="list-style-type: none"> a. Your recommendations regarding the sample agile schedule below. b. What functionality could look like in the first, second and third quarters of the 12-month contract. c. Your estimate on how soon the Solution could be by at least one ORIA program with baseline functionality vs used from a holistic, combined, ORIA programs approach. d. Your realistic schedule and approach for bringing at least one program online. e. Your realistic schedule of increasing functionality and your assumptions associated with it for bringing all programs into the Solution. <p>Recommendations for prework ORIA could undertake in advance of the contract to expedite the process for bringing programs into the Solution.</p> <p><i>Example agile schedule for bringing ORIA data and users into the Solution.</i></p> <ul style="list-style-type: none"> a. Customizing solution back end to match existing data. b. Customizing solution front end to match existing data. c. Migrating existing data program by program. d. Programs start entering in new data into the solution once their old data has been migrated. e. Advanced Search functionality. f. Reporting. g. Dashboards. h. Workflows. 		12	7
	COMMENT: Strong response referencing that they will leverage functionality already built for other state refugee agencies. The bidder anticipates deploying the solution in 6-7 months.			
J	<p>Flexibility to Modify Solution: ORIA is likely to add new program(s) or services in the future to meet different emerging client populations and needs. In addition, modifications to existing program and services may be required with a relatively short turnaround time due to new or changing state and federal policies, funding and eligibility mandates. Describe the Solution's scalability and ability to handle growth.</p>		12	8

		<p>a. Can ORIA configure the Solution, including setting up new programs within it? If so, describe in detail the Solutions ability to be configured or scaled by ORIA as State business or technical demands and needs change.</p> <p>b. Describe the timeline for configuration and the level of Bidder support needed. In addition, describe what elements in the Solution are configurable in the future by ORIA without bidder technical support?</p> <p>c. What can be handled by ORIA staff through configuration with no extra cost and what modifications to the Solution would require Bidder assistance and/or an extra cost?</p> <p>Describe the Bidder's services, capability, limitations, timeframe, and process to:</p> <p>d. Train and authorize ORIA staff to be able to make changes (add, edit, delete) to required data sets on our own, and/or</p> <p>e. To have Bidder's staff make the required changes needed by ORIA.</p> <p><i>NOTE: Extra points if ORIA staff can be trained to make Solution changes on our own versus external process that requires additional steps/time/costs, etc. to be able to implement needed changes.</i></p>		
		<p>COMMENT: Good overview of what can be configured (expansive functionality) using drag and drop features in the CareSphere Accelerator. This includes creating and modifying forms, assessment, reports and drop down features.</p>		
	K	<p>Invoicing, Budget Allocation, Expenditure Tracking by Contract Period: ORIA's programs is supported through a mix of state and federal funding, and payments made to service providers can be processed monthly or quarterly during a state or federal fiscal year. Please describe the proposed Solution's capabilities and functionality to capture, enable and track service levels data, which can be used to support invoices, budget development and expenditure reviews outside of the Solution based on ad hoc timeframes?</p>		
		<p>COMMENT: Adequate answer that responds to each aspect of the question.</p>	4	2

L	<p>Data security: ORIA service providers work with eligible clients who are in need of high confidentiality and robust private personal information protection (for examples refugee minors, health screening, etc.). The Apparent Successful Bidder must pass a Security Design Review prior to signing the awarded contract to ensure the Solution can meet security requirements.</p> <p>a. Describe your detailed approach for configuring or customizing the Solution to meet the Agency's security requirement needs found in Standard 141.10 (https://ocio.wa.gov/policies) of the Office of the Chief Information Officer for the state of Washington, and of the DSHS Information Security Policy and Standards Manual.</p> <p>b. Describe all assumptions related to your approach for meeting the Agency's Security Design Review requirements.</p>		4	2
	COMMENT:	Response shows a clear understanding of relevant security policies and adequately answers the question.		
M	<p>Service Requirements:</p> <p>a. Describe in detail how your Solution meets our minimum service requirements found in Attachment A.</p> <p>b. If ORIA staff and/or contracted service providers experience an internet access outage, describe how the Solution or Bidder's support staff would assist in uploading data collected during the internet outage.</p> <p>c. What is your process for recovering lost data?</p> <p>d. How would the Solution or Bidder's support staff assist in the recovery of any lost data?</p> <p>Describe in detail how Bidder would respond to a data breach? What type of assistance would be provided to DSHS?</p>		10	8
	COMMENT:	A comprehensive response that shows the different functionalities in the system to address outages, lost data and data breaches.		

WRITTEN RESPONSE SCORING
February 27-
RFP #2323-833
ORIA Case Management and Database Solution

Vendor Name: CoreSphere, LLC

Evaluator Number: WE4

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score based on the criteria only.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- We would prefer that you leave a comment for each question scored, briefly explaining why you assigned that particular score.
- You may discuss the proposals among the evaluation team, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something that was not asked for in the Solicitation.

Scoring of Proposals

The following available points will be assigned to the proposal for evaluation purposes:

Section 5 – Management Response	34 points
Section 6 – Methodology Response	50 points
Section 7 – Technical Proposal	144 points

If you have questions, please direct them to Nicole Kahle, Solicitation Coordinator, Nicole.Kahle@dshs.wa.gov. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Score	Description	Discussion
90-100% of available points	Exceptional	Clearly superior to that which is average.
70-80%	Above Average	Better than that which is average.
50-60%	Average	Baseline score for each item with adjustments based upon the evaluator's interpretation of the Bidder's response.
30-40%	Below Average	Substandard to that which is average.
10-20%	Failing	Non-responsive or clearly inadequate to that which is average.
0%	No Experience	Response shows no experience in this skill or capability.

Evaluator Scoresheet for RFP #2323-833

You will be evaluating three parts of the bidder's submission: Section 5. Bidder Qualifications and Experience (Management Response), Section 6. Bidder's Proposed Approach (Methodology Response), and Section 7 Bidder's Solution (Technical Response). If a question requires Bidders to submit additional documents, they will be included in an attached document. Any other information submitted that is not included inside Attachment D is not required for Evaluators to review.

5.	BIDDER QUALIFICATIONS AND EXPERIENCE (Management Response)		34 MAX POINTS	SCORE
A	Please describe the experiences, skills and qualifications your organization possesses that are relevant to your ability to perform the Contract that is the subject of this Solicitation. Please include all information that demonstrates your organization's ability to fulfill ORIA's business needs for a case management and database system. Please include any relevant experience that distinguishes your organization or makes your proposed Solution and your services uniquely qualified for the Contract.		6	4
	COMMENT:	The response thoroughly addressed the question.		
B	Please provide an example of collaboration during the installation and initial launch of a complex system with an organization. How did you partner with the organization's staff, coordinate with diverse stakeholders with complex and competing needs and priorities, and handle securely sensitive data? How did you respond to challenges that popped up during the project and/or after the system's launch?		4	3
	COMMENT:	The response thoroughly addressed the question.		
C	Detail an experience working with an agency to configure or customize the Solution to meet their needs. What was your approach and what was the result? What lessons did you learn that you would use to ensure the Solution meets or exceeds ORIA's business needs?		4	1
	COMMENT:	The response partly addressed the question. Additional points would have been given for information on bidders approach and result.		

	D	Please provide the names of the key team members, their positions and/or positions needing to be hired, including any subcontractors you will assign to this Contract. Provide their proposed roles and responsibilities and information describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.	2	1
		COMMENT: The response addressed the question.		
	E	Describe your detailed experience, approach and model for supporting DSHS through the development, initial launch, and iterative enhancements to final development. Describe how you have served diverse clients and users in the past. What were your assumptions related to this experience? How did your approach work? Please describe any challenges you faced and how you overcame them.	6	4
		COMMENT: The response thoroughly addressed the question.		
	F	Please describe your experience in analyzing, validating and documenting requirements and for creating required outputs. As shared in Attachment F: ORIA Programs Overview, there are multiple programs and services which need to be holistically incorporated into the Solution. What has been your approach in working with organizations to understand, confirm and incorporate requirements in projects similar to ORIA's with multiple diverse stakeholders, users, programs and services?	6	3
		COMMENT: The response addressed the question.		
	G	Describe any past experiences you have had working with an organization to develop a system with configuration capabilities, which could nimbly respond with minimal vendor support in a fluid environment, such as when services, policies, needs or Congressional/Legislative mandates change.	6	2
		COMMENT: The response partly addressed the question. Additional points would have been given for a description of past experiences.		

6.	BIDDER PROPOSED APPROACH (Methodology Response)		50 MAX POINTS	SCORE
A	Quality Assurance: Please describe your approach to quality assurance and your QA practices from initiation through operations for ensuring the Solution is maintained and operates according to Service Level Agreements. Please detail: a. your methods for assuring that your services and deliverables are provided in accordance with high quality standards and for immediately correcting any deficiencies. b. your approach and mechanisms for identifying, tracking and reporting defects and issues? c. process for monitoring Solution performance, including that of the end user experience? d. how do you make sure your products meet standards? What are your standards and what do you do if things go wrong?		8	7
	COMMENT:	The response exceptionally addressed the question.		
B	Service Level Agreement: The Bidder is responsible for meeting Service Level Agreements (SLA) and supporting ORIA during disaster recovery and disaster recovery exercises including recovering the Solution according to DSHS RTO/RPO requirements. When working on a new contract, please describe your approach and recommendations for: a. Developing the most cost-effective Service Level Agreement (SLA) that meets business needs and contractual requirements. b. Ensuring your Solution remains operational while meeting all security requirements through timely upgrades, enhancements and fixes. c. Providing information, planning and releasing new versions, bugs fixes, and updates, including during planned and unplanned outages and disaster recovery.		6	3
	COMMENT:	The response addressed the question.		
C	Project Management Services-- Project Timeline: Describe your approach to providing project management services to customize, implement, and launch an ORIA case management Solution, including for the: • Timeline/schedule from initiation, through implementation, testing, training and evaluation/close-out for the Solution to meet the needs outlined in this RFP.		16	8

		<ul style="list-style-type: none"> • Work with ORIA to prioritize features, integrate configuration or customization changes into the Solution, create and deploy training and other key project tasks. • Business needs documentation and your implementation plan to ensure the Solution meets and/or exceeds Scope needs and contractual requirements. • Collaboration with ORIA and contracted service providers to customize the Solution as business needs require or desire. • Testing plan and approach for the Solution that addresses unit testing, user acceptance testing (UAT), regression testing and integration testing. • Your Go Live assessment and planning services for a successful launch, including ensuring appropriate and effective training for each user group. • Evaluation to ensure the Solution meets ORIA and contracted service providers' needs and to develop a plan to adjust with additional customization, if needed. • Describe your assumptions associated with the project management services. 		
		<div>COMMENT:</div> <div>The response addressed the question.</div>		
	D	Ongoing Support Services: Describe your recommended, detailed approach and support model for providing maintenance and ongoing support services for the new Solution. Describe all assumptions related to your approach for ongoing support services.		
		<div>COMMENT:</div> <div>The response thoroughly addressed the question.</div>	6	4
	E	Cost Efficiency: Please describe the measures you employ to assure that your services and deliverables are provided in a cost-effective manner that is consistent with quality outcomes and fair employment practices.		
		<div>COMMENT:</div> <div>The response addressed the question.</div>	6	3
	G	Holistic Approach to Data (Input & Output) question: ORIA has multiple programs detailed in Attachment F that provide a continuum of services to support eligible clients from arrival to naturalization (generally five years of	8	5

		<p>services). It needs a Solution that takes a holistic approach to data collection that is not siloed within any one program, while at the same time, recognizes that each ORIA program has differing goals and purposes that require capturing and tracking unique data specific to that program. Describe the proposed Solution's capabilities/functionality to be able to:</p> <ol style="list-style-type: none"> Achieve a holistic approach to capturing client and services data and information that is shared and/or similar among multiple programs in an efficient and intuitive fashion. Disaggregate data to isolate views of clients and services that is specific to a program and/or provider, if/when needed. 		
		<p>COMMENT: The response thoroughly addressed the question.</p>		
7.	BIDDER SOLUTION (Technical Response)			
			144 MAX POINTS	SCORE
	A	<p>Your Solution: Describe in detail the Solution you are proposing for ORIA to use under the resulting contract, including, but not limited to the:</p> <ol style="list-style-type: none"> Proposed software (name, type, version, release number, etc.). Training provided to users of the Solution. Instructions, documentation and tools provided to ensure end-users will be able to successfully operate the Solution independently on an ongoing basis after training. Base functionality and optional add-on modules. Bidder's Solution and user technical support services. Open source or third-party products and services are used or could be used in conjunction with the Solution (including identifying separately in the proposal any associated costs). End-user license agreement information, including what's required to access and use all products, including third-party products/services. <p>Additional Solution functionality, products or services that RFP specifications or business needs do not address but are necessary to implement and support this Solution and meet ORIA programmatic needs.</p>	16	11
		<p>COMMENT: The response thoroughly addressed the question.</p>		

B	<p>Users Information: ORIA contracts with 80+ statewide contracted service providers to deliver ORIA programs and services to eligible individuals and families. ORIA staff and contracted service providers' staff will be the primary users of the proposed Solution. Some contracted service providers may hold multiple contracts to provide more than one ORIA program or service. Many contracted service providers work with the same individuals and families simultaneously or consecutively to provide services along the ORIA program continuum.</p> <ol style="list-style-type: none"> Describe how the proposed Solution meets the need for a streamlined, interactive, user-friendly approach for users. Describe features in the Solution, if any, that minimize time spent on data entry and that maximize value to support users in their delivery of ORIA services. What type of features are available to achieve a holistic approach to capturing data for all programs and services within ORIA's portfolio, while at the same time are also able to track different services under different programs? For example, all ORIA programs need to capture client demographic information (sharing functionality). However, the use of demographic info for client eligibility may differ for same client across ORIA programs (program-specific functionality). How will your Solution features and functionality allow for both the forest and the trees view of ORIA program and services? What types of features are available for ORIA program managers and contracted service providers to communicate and coordinate around direct client services? What functionality facilitates collaboration between diverse users, while also ensuring confidential data is isolated and accessible to only approved users? Describe the Solution's ability to distinguish contracted service providers and their staff when: <ol style="list-style-type: none"> Multiple contracted service providers manage cases within the same ORIA program or service, Individual contracted service providers manage multiple ORIA services, Multiple staff work for the same contracted service provider in individual programs or services, <p>Individual contracted service provider staff also work within multiple ORIA programs or services.</p>	22	13
	<p>COMMENT: The response thoroughly addressed the question.</p>		
C	<p>Multiple Users: ORIA needs a case management system that allows for diverse users to be simultaneous using the Solution.</p> <ol style="list-style-type: none"> Describe how the Solution manages multiple users accessing the Solution at the same time including what the limitations are regarding simultaneous users, how and why those limitations exist and what abilities ORIA administration would have to configure user limits. Include if the Solution can scale up or down the number of 	4	2

		<p>simultaneous users without affecting performance, latency response times, network connectivity and/or requirements users must meet to have Solution functionality.</p> <p>Use the table in below in addition to details in a narrative.</p>		
		<p>COMMENT: The response addressed the question.</p>		
D		<p>Data migration: Contracted service providers currently use individual Excel worksheets to document client referrals, benefits, services and other programmatic data. Some program data is also documented in the current solution MyRIA and eJAS, which will be sunsetted by this Solution. Describe:</p> <ul style="list-style-type: none"> a. Your recommendations for tools and methods you will use for migrating, validating and integrating data from and to legacy systems with the new Solution. b. You will work with ORIA to determine the scope of ORIA's data migration needs. c. Your Solution will migrate existing Excel data and data found in MyRIA and eJAS into it as needed by ORIA, including your recommended schedule for migrating data from 21 separate programs into the Solution. d. Contracted service providers will have the ongoing option to upload an Excel file with required data, populating existing database fields into the Solution. <p>All assumptions related to your approach for data integration services.</p>	20	12
		<p>COMMENT: The response thoroughly addressed the question.</p>		
E		<p>Eligibility, Intake & Assessment and Self-Sufficiency Plans: Potential clients (individuals and families) may be referred to or walk-in to an ORIA Service Provider for services, and their eligibility must be determined before ORIA programs' services can be provided. An initial Intake and Assessment is required to determine barriers and needs to ensure that the appropriate services are provided and that clients can be reassessed to support emerging needs to stabilize individuals /families and help them thrive in Washington State. Describe your Solution's capabilities, functionality, and streamlined process to:</p> <ul style="list-style-type: none"> a. Reduce or eliminate duplication of efforts to determine eligibility for various programs with the same or different eligibility criteria. b. Capture an initial intake and eligibility and develop an assessment for individuals and/or families that can be shared and revised among multiple service providers working with same clients. 	6	4

		Develop an Individual and/or Family Self-Sufficiency Plan that can be used, viewed, edited and historically tracked.		
	COMMENT:	The response thoroughly addressed the question.		
F	Clients and Services Case Management: From your understanding of the RFP and ORIA programs and services, describe the case management features in the proposed Solution and how they would meet or exceed ORIA and contracted service providers' business needs.		12	8
	COMMENT:	The response thoroughly addressed the question.		
G	Data Management: ORIA needs a Solution that can manage a large amount of data, including private and personal identifying information within the case management system. Please describe in detail your Solution's: <ul style="list-style-type: none"> a. Capacity to store data, documents, reports, etc., including, but not limited to: <ul style="list-style-type: none"> I. Client demographic information. II. Programs in which clients are participating. III. Contracted service providers. IV. Service details. b. Ability to track and display detailed data per retention period and historic high-level data in perpetuity. c. Ability to analyze data for performance measurement, assessments and evaluations, such as the #/% of clients eligible for services vs. receiving services (a desired enhancement). Ability to extract data from the software and store it in data warehouses. The vendor must be able to supply Solution diagrams, field names, data column definitions, and a data dictionary.		14	7
	COMMENT:	The response addressed the question.		
H			8	5

		COMMENT: The response thoroughly addressed the question.		
I	<p>First year functionality schedule: ORIA seeks a Solution that allows for baseline functionality as soon as feasible, ramping up to full implementation by the end of Year 1 of the contract. Please describe in detail:</p> <ul style="list-style-type: none"> a. Your recommendations regarding the sample agile schedule below. b. What functionality could look like in the first, second and third quarters of the 12-month contract. c. Your estimate on how soon the Solution could be by at least one ORIA program with baseline functionality vs used from a holistic, combined, ORIA programs approach. d. Your realistic schedule and approach for bringing at least one program online. e. Your realistic schedule of increasing functionality and your assumptions associated with it for bringing all programs into the Solution. <p>Recommendations for prework ORIA could undertake in advance of the contract to expedite the process for bringing programs into the Solution.</p> <p><i>Example agile schedule for bringing ORIA data and users into the Solution.</i></p> <ul style="list-style-type: none"> a. Customizing solution back end to match existing data. b. Customizing solution front end to match existing data. c. Migrating existing data program by program. d. Programs start entering in new data into the solution once their old data has been migrated. e. Advanced Search functionality. f. Reporting. g. Dashboards. h. Workflows. 		12	6
		COMMENT: The response addressed the question.		
J	<p>Flexibility to Modify Solution: ORIA is likely to add new program(s) or services in the future to meet different emerging client populations and needs. In addition, modifications to existing program and services may be required with a relatively short turnaround time due to new or changing state and federal policies, funding and eligibility mandates. Describe the Solution's scalability and ability to handle growth.</p>		12	7

		<p>a. Can ORIA configure the Solution, including setting up new programs within it? If so, describe in detail the Solutions ability to be configured or scaled by ORIA as State business or technical demands and needs change.</p> <p>b. Describe the timeline for configuration and the level of Bidder support needed. In addition, describe what elements in the Solution are configurable in the future by ORIA without bidder technical support?</p> <p>c. What can be handled by ORIA staff through configuration with no extra cost and what modifications to the Solution would require Bidder assistance and/or an extra cost?</p> <p>Describe the Bidder's services, capability, limitations, timeframe, and process to:</p> <p>d. Train and authorize ORIA staff to be able to make changes (add, edit, delete) to required data sets on our own, and/or</p> <p>e. To have Bidder's staff make the required changes needed by ORIA.</p> <p><i>NOTE: Extra points if ORIA staff can be trained to make Solution changes on our own versus external process that requires additional steps/time/costs, etc. to be able to implement needed changes.</i></p>		
		<p>COMMENT: The response addressed the question.</p>		
	K	<p>Invoicing, Budget Allocation, Expenditure Tracking by Contract Period: ORIA's programs is supported through a mix of state and federal funding, and payments made to service providers can be processed monthly or quarterly during a state or federal fiscal year. Please describe the proposed Solution's capabilities and functionality to capture, enable and track service levels data, which can be used to support invoices, budget development and expenditure reviews outside of the Solution based on ad hoc timeframes?</p>		
		<p>COMMENT: The response addressed the question.</p>	4	2

L	<p>Data security: ORIA service providers work with eligible clients who are in need of high confidentiality and robust private personal information protection (for examples refugee minors, health screening, etc.). The Apparent Successful Bidder must pass a Security Design Review prior to signing the awarded contract to ensure the Solution can meet security requirements.</p> <ul style="list-style-type: none"> a. Describe your detailed approach for configuring or customizing the Solution to meet the Agency's security requirement needs found in Standard 141.10 (https://ocio.wa.gov/policies) of the Office of the Chief Information Officer for the state of Washington, and of the DSHS Information Security Policy and Standards Manual. b. Describe all assumptions related to your approach for meeting the Agency's Security Design Review requirements. 	4	2
	<p>COMMENT: The response addressed the question.</p>		
M	<p>Service Requirements:</p> <ul style="list-style-type: none"> a. Describe in detail how your Solution meets our minimum service requirements found in Attachment A. b. If ORIA staff and/or contracted service providers experience an internet access outage, describe how the Solution or Bidder's support staff would assist in uploading data collected during the internet outage. c. What is your process for recovering lost data? d. How would the Solution or Bidder's support staff assist in the recovery of any lost data? <p>Describe in detail how Bidder would respond to a data breach? What type of assistance would be provided to DSHS?</p>	10	7
	<p>COMMENT: The response thoroughly addressed the question.</p>		

WRITTEN RESPONSE SCORING
February 27-
RFP #2323-833
ORIA Case Management and Database Solution

Vendor Name: CoreSphere, LLC

Evaluator Number: 5

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score based on the criteria only.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- We would prefer that you leave a comment for each question scored, briefly explaining why you assigned that particular score.
- You may discuss the proposals among the evaluation team, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something that was not asked for in the Solicitation.

Scoring of Proposals

The following available points will be assigned to the proposal for evaluation purposes:

Section 5 – Management Response	34 points
Section 6 – Methodology Response	50 points
Section 7 – Technical Proposal	144 points

If you have questions, please direct them to Nicole Kahle, Solicitation Coordinator, Nicole.Kahle@dshs.wa.gov. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Score	Description	Discussion
90-100% of available points	Exceptional	Clearly superior to that which is average.
70-80%	Above Average	Better than that which is average.
50-60%	Average	Baseline score for each item with adjustments based upon the evaluator's interpretation of the Bidder's response.
30-40%	Below Average	Substandard to that which is average.
10-20%	Failing	Non-responsive or clearly inadequate to that which is average.
0%	No Experience	Response shows no experience in this skill or capability.

Evaluator Scoresheet for RFP #2323-833

You will be evaluating three parts of the bidder's submission: Section 5. Bidder Qualifications and Experience (Management Response), Section 6. Bidder's Proposed Approach (Methodology Response), and Section 7 Bidder's Solution (Technical Response). If a question requires Bidders to submit additional documents, they will be included in an attached document. Any other information submitted that is not included inside Attachment D is not required for Evaluators to review.

5.	BIDDER QUALIFICATIONS AND EXPERIENCE (Management Response)		34 MAX POINTS	SCORE
	A	Please describe the experiences, skills and qualifications your organization possesses that are relevant to your ability to perform the Contract that is the subject of this Solicitation. Please include all information that demonstrates your organization's ability to fulfill ORIA's business needs for a case management and database system. Please include any relevant experience that distinguishes your organization or makes your proposed Solution and your services uniquely qualified for the Contract.	6	4
		COMMENT: Extensive experience in public sector and high customer satisfaction.		
	B	Please provide an example of collaboration during the installation and initial launch of a complex system with an organization. How did you partner with the organization's staff, coordinate with diverse stakeholders with complex and competing needs and priorities, and handle securely sensitive data? How did you respond to challenges that popped up during the project and/or after the system's launch?	4	2
		COMMENT: Good example provided.		
	C	Detail an experience working with an agency to configure or customize the Solution to meet their needs. What was your approach and what was the result? What lessons did you learn that you would use to ensure the Solution meets or exceeds ORIA's business needs?	4	3
		COMMENT: Very applicable example, bring up data migration has a common challenge. I believe this will be one of our largest challenges.		

	D	Please provide the names of the key team members, their positions and/or positions needing to be hired, including any subcontractors you will assign to this Contract. Provide their proposed roles and responsibilities and information describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its key personnel from the Project without prior approval of DSHS.	2	1
		COMMENT: Answered very thoroughly. Clear roles and responsibilities for experienced individuals.		
	E	Describe your detailed experience, approach and model for supporting DSHS through the development, initial launch, and iterative enhancements to final development. Describe how you have served diverse clients and users in the past. What were your assumptions related to this experience? How did your approach work? Please describe any challenges you faced and how you overcame them.	6	3
		COMMENT: Examples were very relevant. Challenges related to data migration were addressed. Given explanation of approach, I worry the training may be slightly technical for our providers.		
	F	Please describe your experience in analyzing, validating and documenting requirements and for creating required outputs. As shared in Attachment F: ORIA Programs Overview, there are multiple programs and services which need to be holistically incorporated into the Solution. What has been your approach in working with organizations to understand, confirm and incorporate requirements in projects similar to ORIA's with multiple diverse stakeholders, users, programs and services?	6	2
		COMMENT: While user stories may allow for an understanding of the requirements of the project, I would have liked additional detail on previous approaches especially as it relates to diverse stakeholders, users, programs and services to feel the answer was sufficient.		
	G	Describe any past experiences you have had working with an organization to develop a system with configuration capabilities, which could nimbly respond with minimal vendor support in a fluid environment, such as when services, policies, needs or Congressional/Legislative mandates change.	6	2
		COMMENT: No response on describing past experiences other than generally having experience in multiple client environments. Proposed solution seems adaptable based on bullet points.		

6.	BIDDER PROPOSED APPROACH (Methodology Response)		50 MAX POINTS	SCORE
A	Quality Assurance: Please describe your approach to quality assurance and your QA practices from initiation through operations for ensuring the Solution is maintained and operates according to Service Level Agreements. Please detail: a. your methods for assuring that your services and deliverables are provided in accordance with high quality standards and for immediately correcting any deficiencies. b. your approach and mechanisms for identifying, tracking and reporting defects and issues? c. process for monitoring Solution performance, including that of the end user experience? d. how do you make sure your products meet standards? What are your standards and what do you do if things go wrong?		8	6
	COMMENT:	I appreciated the mention of End User Experience Monitoring and User Fededback and Surveys. User Engagement for performance monitoring and optimization efforts, seems to include user experience in solutions. Answered very thoroughly.		
B	Service Level Agreement: The Bidder is responsible for meeting Service Level Agreements (SLA) and supporting ORIA during disaster recovery and disaster recovery exercises including recovering the Solution according to DSHS RTO/RPO requirements. When working on a new contract, please describe your approach and recommendations for: a. Developing the most cost-effective Service Level Agreement (SLA) that meets business needs and contractual requirements. b. Ensuring your Solution remains operational while meeting all security requirements through timely upgrades, enhancements and fixes. c. Providing information, planning and releasing new versions, bugs fixes, and updates, including during planned and unplanned outages and disaster recovery.		6	3
	COMMENT:	Answered sufficiently.		
C	Project Management Services-- Project Timeline: Describe your approach to providing project management services to customize, implement, and launch an ORIA case management Solution, including for the: • Timeline/schedule from initiation, through implementation, testing, training and evaluation/close-out for the Solution to meet the needs outlined in this RFP.		16	6

	<ul style="list-style-type: none">• Work with ORIA to prioritize features, integrate configuration or customization changes into the Solution, create and deploy training and other key project tasks.• Business needs documentation and your implementation plan to ensure the Solution meets and/or exceeds Scope needs and contractual requirements.• Collaboration with ORIA and contracted service providers to customize the Solution as business needs require or desire.• Testing plan and approach for the Solution that addresses unit testing, user acceptance testing (UAT), regression testing and integration testing.• Your Go Live assessment and planning services for a successful launch, including ensuring appropriate and effective training for each user group.• Evaluation to ensure the Solution meets ORIA and contracted service providers’ needs and to develop a plan to adjust with additional customization, if needed.• Describe your assumptions associated with the project management services.		
	COMMENT: I appreciate the reference to metrics driven decision making, stakeholder engagement and collboarton, adaptive planning, etc. Points deducted for no timeline being present.		
D	Ongoing Support Services: Describe your recommended, detailed approach and support model for providing maintenance and ongoing support services for the new Solution. Describe all assumptions related to your approach for ongoing support services.		
	COMMENT: 24/7 incident response, tiered system for ongoing support services, continuous improvement.	6	4
E	Cost Efficiency: Please describe the measures you employ to assure that your services and deliverables are provided in a cost-effective manner that is consistent with quality outcomes and fair employment practices.		
	COMMENT: Addressed cost efficiency sufficiently. Did not address fair employment practices.	6	2
G	Holistic Approach to Data (Input & Output) question: ORIA has multiple programs detailed in Attachment F that provide a continuum of services to support eligible clients from arrival to naturalization (generally five years of	8	4

		<p>services). It needs a Solution that takes a holistic approach to data collection that is not siloed within any one program, while at the same time, recognizes that each ORIA program has differing goals and purposes that require capturing and tracking unique data specific to that program. Describe the proposed Solution's capabilities/functionality to be able to:</p> <ol style="list-style-type: none"> Achieve a holistic approach to capturing client and services data and information that is shared and/or similar among multiple programs in an efficient and intuitive fashion. Disaggregate data to isolate views of clients and services that is specific to a program and/or provider, if/when needed. 		
		<p>COMMENT: Answered sufficiently.</p>		
7.	BIDDER SOLUTION (Technical Response)		144 MAX POINTS	SCORE
	A	<p>Your Solution: Describe in detail the Solution you are proposing for ORIA to use under the resulting contract, including, but not limited to the:</p> <ol style="list-style-type: none"> Proposed software (name, type, version, release number, etc.). Training provided to users of the Solution. Instructions, documentation and tools provided to ensure end-users will be able to successfully operate the Solution independently on an ongoing basis after training. Base functionality and optional add-on modules. Bidder's Solution and user technical support services. Open source or third-party products and services are used or could be used in conjunction with the Solution (including identifying separately in the proposal any associated costs). End-user license agreement information, including what's required to access and use all products, including third-party products/services. <p>Additional Solution functionality, products or services that RFP specifications or business needs do not address but are necessary to implement and support this Solution and meet ORIA programmatic needs.</p>	16	10
		<p>COMMENT: The reference to "Training Needs Assessment" is great. I appreciate the description of the training delivery model (jand-on, train the trainer, interactive, etc). Pot training support is crucial.</p>		

	B	<p>Users Information: ORIA contracts with 80+ statewide contracted service providers to deliver ORIA programs and services to eligible individuals and families. ORIA staff and contracted service providers' staff will be the primary users of the proposed Solution. Some contracted service providers may hold multiple contracts to provide more than one ORIA program or service. Many contracted service providers work with the same individuals and families simultaneously or consecutively to provide services along the ORIA program continuum.</p> <ol style="list-style-type: none"> Describe how the proposed Solution meets the need for a streamlined, interactive, user-friendly approach for users. Describe features in the Solution, if any, that minimize time spent on data entry and that maximize value to support users in their delivery of ORIA services. What type of features are available to achieve a holistic approach to capturing data for all programs and services within ORIA's portfolio, while at the same time are also able to track different services under different programs? For example, all ORIA programs need to capture client demographic information (sharing functionality). However, the use of demographic info for client eligibility may differ for same client across ORIA programs (program-specific functionality). How will your Solution features and functionality allow for both the forest and the trees view of ORIA program and services? What types of features are available for ORIA program managers and contracted service providers to communicate and coordinate around direct client services? What functionality facilitates collaboration between diverse users, while also ensuring confidential data is isolated and accessible to only approved users? Describe the Solution's ability to distinguish contracted service providers and their staff when: <ol style="list-style-type: none"> Multiple contracted service providers manage cases within the same ORIA program or service, Individual contracted service providers manage multiple ORIA services, Multiple staff work for the same contracted service provider in individual programs or services, Individual contracted service provider staff also work within multiple ORIA programs or services. 	22	12
		<p>COMMENT: Sophisticated tools for reducing data duplication and examples that demonstrate an understanding of our work. Seems adaptable to various views for various programs and providers.</p>		
	C	<p>Multiple Users: ORIA needs a case management system that allows for diverse users to be simultaneous using the Solution.</p> <ol style="list-style-type: none"> Describe how the Solution manages multiple users accessing the Solution at the same time including what the limitations are regarding simultaneous users, how and why those limitations exist and what abilities ORIA administration would have to configure user limits. Include if the Solution can scale up or down the number of 	4	2

		<p>simultaneous users without affecting performance, latency response times, network connectivity and/or requirements users must meet to have Solution functionality.</p> <p>Use the table in below in addition to details in a narrative.</p>		
		<p>COMMENT: Answered sufficiently. I appreciate the fact that ORIS staff are able to make configuration changes to solution.</p>		
D	<p>Data migration: Contracted service providers currently use individual Excel worksheets to document client referrals, benefits, services and other programmatic data. Some program data is also documented in the current solution MyRIA and eJAS, which will be sunsetted by this Solution. Describe:</p> <ul style="list-style-type: none"> a. Your recommendations for tools and methods you will use for migrating, validating and integrating data from and to legacy systems with the new Solution. b. You will work with ORIA to determine the scope of ORIA’s data migration needs. c. Your Solution will migrate existing Excel data and data found in MyRIA and eJAS into it as needed by ORIA, including your recommended schedule for migrating data from 21 separate programs into the Solution. d. Contracted service providers will have the ongoing option to upload an Excel file with required data, populating existing database fields into the Solution. <p>All assumptions related to your approach for data integration services.</p>		20	10
	<p>COMMENT: Has a plan in place. I worry about what the process of “Data would have to be cleansed and standardized per CorSphere guidance” exactly entails.</p>			
E	<p>Eligibility, Intake & Assessment and Self-Sufficiency Plans: Potential clients (individuals and families) may be referred to or walk-in to an ORIA Service Provider for services, and their eligibility must be determined before ORIA programs’ services can be provided. An initial Intake and Assessment is required to determine barriers and needs to ensure that the appropriate services are provided and that clients can be reassessed to support emerging needs to stabilize individuals /families and help them thrive in Washington State. Describe your Solution’s capabilities, functionality, and streamlined process to:</p> <ul style="list-style-type: none"> a. Reduce or eliminate duplication of efforts to determine eligibility for various programs with the same or different eligibility criteria. b. Capture an initial intake and eligibility and develop an assessment for individuals and/or families that can be shared and revised among multiple service providers working with same clients. 		6	4

		Develop an Individual and/or Family Self-Sufficiency Plan that can be used, viewed, edited and historically tracked.		
	COMMENT:	Appreciate reference to user friendly screens and assessments and ability to create various plan versions.		
	F	Clients and Services Case Management: From your understanding of the RFP and ORIA programs and services, describe the case management features in the proposed Solution and how they would meet or exceed ORIA and contracted service providers' business needs.	12	8
	COMMENT:	Map of providers could be a great way to ensure holistic support and care coordination. Confidentiality is ensured either based on program or on providers choice. Notifications/Alerts could be helpful for providers.		
	G	Data Management: ORIA needs a Solution that can manage a large amount of data, including private and personal identifying information within the case management system. Please describe in detail your Solution's: <ul style="list-style-type: none"> a. Capacity to store data, documents, reports, etc., including, but not limited to: <ul style="list-style-type: none"> I. Client demographic information. II. Programs in which clients are participating. III. Contracted service providers. IV. Service details. b. Ability to track and display detailed data per retention period and historic high-level data in perpetuity. c. Ability to analyze data for performance measurement, assessments and evaluations, such as the #/% of clients eligible for services vs. receiving services (a desired enhancement). Ability to extract data from the software and store it in data warehouses. The vendor must be able to supply Solution diagrams, field names, data column definitions, and a data dictionary.	14	7
	COMMENT:	Answered sufficiently. Has various ways to display data and outcomes/performance.		
	H		8	5

		COMMENT:	Report builder seems user friendly and intuitive Various tools for data visualization. Reports are exportable to excel – will be useful for ORR reporting..		
I		<p>First year functionality schedule: ORIA seeks a Solution that allows for baseline functionality as soon as feasible, ramping up to full implementation by the end of Year 1 of the contract. Please describe in detail:</p> <ol style="list-style-type: none"> Your recommendations regarding the sample agile schedule below. What functionality could look like in the first, second and third quarters of the 12-month contract. Your estimate on how soon the Solution could be by at least one ORIA program with baseline functionality vs used from a holistic, combined, ORIA programs approach. Your realistic schedule and approach for bringing at least one program online. Your realistic schedule of increasing functionality and your assumptions associated with it for bringing all programs into the Solution. <p>Recommendations for prework ORIA could undertake in advance of the contract to expedite the process for bringing programs into the Solution.</p> <p><i>Example agile schedule for bringing ORIA data and users into the Solution.</i></p> <ol style="list-style-type: none"> <i>Customizing solution back end to match existing data.</i> <i>Customizing solution front end to match existing data.</i> <i>Migrating existing data program by program.</i> <i>Programs start entering in new data into the solution once their old data has been migrated.</i> <i>Advanced Search functionality.</i> <i>Reporting.</i> <i>Dashboards.</i> <i>Workflows.</i> 		12	5
		COMMENT:	Timeline provided for various aspects. I would like to learn more about plan for ongoing evaluation within those first 12 months. I assume this is an iterative process. Timeline stopped after Month 7 and just referenced maintenance activities.		
J		<p>Flexibility to Modify Solution: ORIA is likely to add new program(s) or services in the future to meet different emerging client populations and needs. In addition, modifications to existing program and services may be required with a relatively short turnaround time due to new or changing state and federal policies, funding and eligibility mandates. Describe the Solution’s scalability and ability to handle growth.</p>		12	7

		<p>a. Can ORIA configure the Solution, including setting up new programs within it? If so, describe in detail the Solutions ability to be configured or scaled by ORIA as State business or technical demands and needs change.</p> <p>b. Describe the timeline for configuration and the level of Bidder support needed. In addition, describe what elements in the Solution are configurable in the future by ORIA without bidder technical support?</p> <p>c. What can be handled by ORIA staff through configuration with no extra cost and what modifications to the Solution would require Bidder assistance and/or an extra cost?</p> <p>Describe the Bidder's services, capability, limitations, timeframe, and process to:</p> <p>d. Train and authorize ORIA staff to be able to make changes (add, edit, delete) to required data sets on our own, and/or</p> <p>e. To have Bidder's staff make the required changes needed by ORIA.</p> <p><i>NOTE: Extra points if ORIA staff can be trained to make Solution changes on our own versus external process that requires additional steps/time/costs, etc. to be able to implement needed changes.</i></p>		
		<p>COMMENT: Solution seems very adaptable and changes can be implemented by ORIA staff.</p>		
	K	<p>Invoicing, Budget Allocation, Expenditure Tracking by Contract Period: ORIA's programs is supported through a mix of state and federal funding, and payments made to service providers can be processed monthly or quarterly during a state or federal fiscal year. Please describe the proposed Solution's capabilities and functionality to capture, enable and track service levels data, which can be used to support invoices, budget development and expenditure reviews outside of the Solution based on ad hoc timeframes?</p>		
		<p>COMMENT: Includes reports for invoicing and payments. Includes dashboards which could be useful for providers.</p>	4	3

L	<p>Data security: ORIA service providers work with eligible clients who are in need of high confidentiality and robust private personal information protection (for examples refugee minors, health screening, etc.). The Apparent Successful Bidder must pass a Security Design Review prior to signing the awarded contract to ensure the Solution can meet security requirements.</p> <ul style="list-style-type: none"> a. Describe your detailed approach for configuring or customizing the Solution to meet the Agency's security requirement needs found in Standard 141.10 (https://ocio.wa.gov/policies) of the Office of the Chief Information Officer for the state of Washington, and of the DSHS Information Security Policy and Standards Manual. b. Describe all assumptions related to your approach for meeting the Agency's Security Design Review requirements. 	4	2
	<p>COMMENT: Answered sufficiently.</p>		
M	<p>Service Requirements:</p> <ul style="list-style-type: none"> a. Describe in detail how your Solution meets our minimum service requirements found in Attachment A. b. If ORIA staff and/or contracted service providers experience an internet access outage, describe how the Solution or Bidder's support staff would assist in uploading data collected during the internet outage. c. What is your process for recovering lost data? d. How would the Solution or Bidder's support staff assist in the recovery of any lost data? <p>Describe in detail how Bidder would respond to a data breach? What type of assistance would be provided to DSHS?</p>	10	5
	<p>COMMENT: Tools in place for supporting recovery of lost data, plan for response, etc.</p>		

ORAL INTERVIEW SCORING
July 8-11, 2024
RFP # 2323-833
ORIA Case Management and Database System

Vendor Name: Coresphere

Evaluator Number: WE-1

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score only based on the Vendor's response in each competency area.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- You may discuss the proposals among the evaluation team after the interviews, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something outside of the competency areas being judged.

The Oral Evaluation is comprised of two parts: a 30 minute bidder presentation to highlight the most effective features of bidder's product and 45 minutes of questions by the evaluation panel.

The presentation from the candidate is worth 25 points. Panel Questions will be scored as follows: .

If you have questions, please direct them to Nicole Kahle, Solicitation Coordinator. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Oral Evaluation Presentation Information:

#	Show your solution's functionality, including how it:	Yes
1	Provides an interface for many different programs.	y
2	Can be configured or customized in the future by ORIA.	y
3	Includes dashboards, which vary depending on the registered profiles, allowing users to filter or customize the dashboard to fit their viewing needs.	y
4	Has workflows where approvals are tracked and explain how additional workflows can be created.	y
5	Links within families or households, with users able to view data individually, as well as holistically at the broader family level.	y
6	Links individuals to all of the services, programs, service providers with which they are associated, ensuring that service levels can be viewed with each program, as well as across all programs.	y
7	Facilitates quality data entry from multiple users with varying degrees of familiarity with databases, English and technology to minimize the risks of users duplicating client records or making other data entry errors.	y
8	Includes a system for fixing errors and duplications.	y
9	Has the ability to flag when information is in non-compliance, in error, and/or duplicated.	y
10	Allows users to upload an Excel file to populate the solution and to export data out of the system.	y
11	Enables users to view and show the data in a variety of ways through reports.	y
12	Generates customized reports created ad hoc by users.	y
13	Retains high-level, historical data in perpetuity for reporting purposes and detailed data for up to 7 years.	Y
14	Includes forms, which can be modified, and new forms that can be created by ORIA staff.	y
15	Uses e-signatures for online forms, with the ability to sign manually when needed.	y
16	Tracks access by users with an audit trail.	y
17	Allows staff to create confidential case notes for their own use and to share with others, who have correct permissions.	y
18	Allows service providers staff within the same organization or between/among differing providers serving the same clients to communicate, refer and coordinate services and support that can promote client's capacity to participate in ORIA services successfully.	y
19	Requires mandatory documents needing to be attached.	y
20	Includes help text to explain what fields might be confusing to service providers.	y
21	Has data analysis capabilities.	y
22	Tracks services levels and associated funding.	y
23	Can integrate with other systems, such as eJas.	Y
24	Is mobile friendly application that can be run efficiently on any device.	Y
25	Includes advanced search capabilities.	y

The 7 Oral Evaluation Questions are:

1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What’s going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?
2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can’t anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA’s fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?
3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?
4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA’s culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?
5. How would you approach working with ORIA to accomplish our proposed schedule, from planning through migration, training and go-live? As a collaborator with our team, what are your approaches to consensus building, working through and resolving differing perspectives, so we can focus on obtaining contract goals?
6. What is your plan for coaching, training and supporting (i.e. technical assistance, 1:1 orientation, etc.) individuals who have differing levels of technology comfort, experience and English language proficiency? How do you ensure comprehension within your training?
7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Oral Evaluator General Notes:

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Oral Evaluator Scoring:

Question 1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What's going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?

Comments – experience with more than 20 organizations – Ensure that empathy is a the core of anything that they do. Provide ongoing support comprehensive guides with step by step instructions. If your tool is friendly – baked into human centered design – ensured that system is user friendly. Ensuring collaboration and consensus. Important to involve different people in decision-making. Including the champions for the decision-making. Not just the leaders.

Points Awarded _____20_____ out of 20

Question 2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can't anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA's fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?

Comments – Easily configurable and adaptable

Points Awarded _____20_____ out of 20

Question 3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?

Comments – discovery sessions – meet with each program and staff that are going to be explaining their business process – from when a client walks in the door. What does that look like – create an artifact as an as need process – did we get this right – needing as much information upfront as possible – business process guides, state or federal guidelines, looking at the screen shots of the existing system, helps to understand all of the nuances for what that process looks like - shadow staff how people are doing their data entry now – hear narrative from staff – pain points or places – identify areas that can be more efficient – show or demo system early and often – I really like the demo planning a lot of time ahead of schedule – lots of time – working this much on this having that time set aside – discovery plan – anticipate week by week this is the time we would like to spend with each week. Track decisions – with multiple programs and groups

Points Awarded _____15____out of 15

Question 4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA's culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?

Comments – Culture of collaboration – goal is to be a partner and engaging and involving all of the stakeholders at all the different levels in the decision making process

Points Awarded _____14____out of 15

Question 5. How would you approach working with ORIA to accomplish our proposed schedule, from planning through migration, training and go-live? As a collaborator with our team, what are your approaches to consensus building, working through and resolving differing perspectives, so we can focus on obtaining contract goals?

Comments – identify up front what is the goal and what needs to be accomplished – some of the nuances that allow us to work backwards – Planning out every stage of the

process – focused on achieving X it may not fit into this particular time point- something that we need to discuss. Have a solution working toward a common goal. Being collaborative and having users be at the core. Challenges is scope creep – ensure that there is not scope creep -

Points Awarded _____10____out of 10

Question 6. What is your plan for coaching, training and supporting (i.e. technical assistance, 1:1 orientation, etc.) individuals who have differing levels of technology comfort, experience and English language proficiency? How do you ensure comprehension within your training?

Comments – sprint and testing and training – visual learners or hands on training – understand the needs of users offer a menu of things for what they could do. Lots of hands on deck – train the trainers – keeping trainings focused on trainings – change requests – enhancements to the system – allowing us to move forward in the training – input in the process – Hyper care

Points Awarded _____9____out of 10

Question 7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

They have not had a situation where learners have not grasped – persona based training – job aides – feedback survey or train the training offer additional support and training – Repetition is very helpful – takes awhile for people to absorb things – not every one understands things the way that I explain them. Sitting with someone to help them do their daily work – people are afraid to make mistakes – 1:1 with someone that they are working with – get to see that there isn't anything that they can break or – hands on – releasing the system to refugee coordinators and getting a feel prior to the UAD system – hadns on feel of the system is extremely helpful

Points Awarded _____10____out of 10

ORAL INTERVIEW SCORING
July 8-11, 2024
RFP # 2323-833
ORIA Case Management and Database System

Vendor Name: Coresphere

Evaluator Number: 2

General Guidelines:

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1	Provides an interface for many different programs.	Y
2	Can be configured or customized in the future by ORIA.	Y
3	Includes dashboards, which vary depending on the registered profiles, allowing users to filter or customize the dashboard to fit their viewing needs.	Y
4	Has workflows where approvals are tracked and explain how additional workflows can be created.	Y
5	Links within families or households, with users able to view data individually, as well as holistically at the broader family level.	Y
6	Links individuals to all of the services, programs, service providers with which they are associated, ensuring that service levels can be viewed with each program, as well as across all programs.	Y
7	Facilitates quality data entry from multiple users with varying degrees of familiarity with databases, English and technology to minimize the risks of users duplicating client records or making other data entry errors.	Y
8	Includes a system for fixing errors and duplications.	Y
9	Has the ability to flag when information is in non-compliance, in error, and/or duplicated.	Y
10	Allows users to upload an Excel file to populate the solution and to export data out of the system.	Y
11	Enables users to view and show the data in a variety of ways through reports.	Y
12	Generates customized reports created ad hoc by users.	Y
13	Retains high-level, historical data in perpetuity for reporting purposes and detailed data for up to 7 years.	Y
14	Includes forms, which can be modified, and new forms that can be created by ORIA staff.	Y
15	Uses e-signatures for online forms, with the ability to sign manually when needed.	Y
16	Tracks access by users with an audit trail.	Y
17	Allows staff to create confidential case notes for their own use and to share with others, who have correct permissions.	Y
18	Allows service providers staff within the same organization or between/among differing providers serving the same clients to communicate, refer and coordinate services and support that can promote client's capacity to participate in ORIA services successfully.	Y
19	Requires mandatory documents needing to be attached.	Y
20	Includes help text to explain what fields might be confusing to service providers.	Y
21	Has data analysis capabilities.	Y
22	Tracks services levels and associated funding.	Y
23	Can integrate with other systems, such as eJas.	Y
24	Is mobile friendly application that can be run efficiently on any device.	Y
25	Includes advanced search capabilities.	Y

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Comments Empathy. Resources personalized. Ongoing support. Human Centered Design. Consensus.

Points Awarded 16 out of 20

Question 2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can't anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA's fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?

Comments Form builder. Assessment tool. Training on both. Data Driven. ORIA will be able to do updates. Updates can be seen in reports immediately. Work with other refugee services so will be aware of legislative changes.

Points Awarded 18 out of 20

Question 3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?

Comments Meet with each program during discovery. Business process guides. Screenshots of existing processes. Shadow staff. Narrative from staff about current pain points. Demo early and often.

Points Awarded 14 out of 15

Question 4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA's culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?

Comments

Diverse. Washington Post top place to work 4 years in a row.

Points Awarded 8 out of 15

Question 5. How would you approach working with ORIA to accomplish our proposed schedule, from planning through migration, training and go-live? As a collaborator with our team, what are your approaches to consensus building, working through and resolving differing perspectives, so we can focus on obtaining contract goals?

Comments Identifying nuances in contract to work backwards. Identify what we want to accomplish in time frame. Planning every stage.

Points Awarded 6 out of 10

Question 6. What is your plan for coaching, training and supporting (i.e. technical assistance, 1:1 orientation, etc.) individuals who have differing levels of technology comfort, experience and English language proficiency? How do you ensure comprehension within your training?

Comments Training starts early. Show early versions for gradual exposure. User acceptance testing after some functionality is ready. In-person training. Train the trainer. Cheat-sheets. Online training. Small group training

Points Awarded 9 out of 10

Question 7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Comments

Haven't had a situation where learners hadn't grasped it at all. Feedback survey. Train the trainer. Additional trainer.

Points Awarded 5 out of 10

ORAL INTERVIEW SCORING
July 8-11, 2024
RFP # 2323-833
ORIA Case Management and Database System

Vendor Name: Coresphere

Evaluator Number: 3

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score only based on the Vendor's response in each competency area.
- Please note all scores and comments in the allotted sections. If you change a score, initial the change.
- Please include comments that will assist the vendor in understanding why the response did not get full points. Positive comments are also welcome.
- You may discuss the proposals among the evaluation team after the interviews, but each evaluator should score independently. **We do not use consensus scoring.**
- Do not downgrade a proposal because it did not address something outside of the competency areas being judged.

The Oral Evaluation is comprised of two parts: a 30 minute bidder presentation to highlight the most effective features of bidder's product and 45 minutes of questions by the evaluation panel.

The presentation from the candidate is worth 25 points. Panel Questions will be scored as follows: .

If you have questions, please direct them to Nicole Kahle, Solicitation Coordinator. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Oral Evaluation Presentation Information:

#	Show your solution's functionality, including how it:	Yes
1	Provides an interface for many different programs.	Yes
2	Can be configured or customized in the future by ORIA.	Yes
3	Includes dashboards, which vary depending on the registered profiles, allowing users to filter or customize the dashboard to fit their viewing needs.	Yes
4	Has workflows where approvals are tracked and explain how additional workflows can be created.	Yes
5	Links within families or households, with users able to view data individually, as well as holistically at the broader family level.	Yes
6	Links individuals to all of the services, programs, service providers with which they are associated, ensuring that service levels can be viewed with each program, as well as across all programs.	Yes
7	Facilitates quality data entry from multiple users with varying degrees of familiarity with databases, English and technology to minimize the risks of users duplicating client records or making other data entry errors.	Yes
8	Includes a system for fixing errors and duplications.	Yes
9	Has the ability to flag when information is in non-compliance, in error, and/or duplicated.	Yes
10	Allows users to upload an Excel file to populate the solution and to export data out of the system.	Yes
11	Enables users to view and show the data in a variety of ways through reports.	Yes
12	Generates customized reports created ad hoc by users.	Yes
13	Retains high-level, historical data in perpetuity for reporting purposes and detailed data for up to 7 years.	
14	Includes forms, which can be modified, and new forms that can be created by ORIA staff.	Yes
15	Uses e-signatures for online forms, with the ability to sign manually when needed.	Yes
16	Tracks access by users with an audit trail.	
17	Allows staff to create confidential case notes for their own use and to share with others, who have correct permissions.	Yes
18	Allows service providers staff within the same organization or between/among differing providers serving the same clients to communicate, refer and coordinate services and support that can promote client's capacity to participate in ORIA services successfully.	Yes
19	Requires mandatory documents needing to be attached.	Yes
20	Includes help text to explain what fields might be confusing to service providers.	Yes
21	Has data analysis capabilities.	Yes
22	Tracks services levels and associated funding.	Yes
23	Can integrate with other systems, such as eJas.	Yes
24	Is mobile friendly application that can be run efficiently on any device.	Yes
25	Includes advanced search capabilities.	Yes

The 7 Oral Evaluation Questions are:

1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What's going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?
2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can't anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA's fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?
3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?
4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA's culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?
5. How would you approach working with ORIA to accomplish our proposed schedule, from planning through migration, training and go-live? As a collaborator with our team, what are your approaches to consensus building, working through and resolving differing perspectives, so we can focus on obtaining contract goals?
6. What is your plan for coaching, training and supporting (i.e. technical assistance, 1:1 orientation, etc.) individuals who have differing levels of technology comfort, experience and English language proficiency? How do you ensure comprehension within your training?
7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Oral Evaluator General Notes:

Demo used a caseworker scenario. When they log in they see a personal dashboard and a navigation bar. The demo shows an understanding of the type of data and services that will be integrated into our system. They are very familiar with ORR and refugee data systems because they launched a CMS in N. Dakota and have some understanding. Their approach to engagement and training was grounded in inclusiveness and addressing the needs of the individual. There is a significant advantage of a provider that has an existing understanding of our current data elements.

Oral Evaluator Scoring:

Question 1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What's going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?

Comments:

They personalize training to meet different types of learning styles. They focus on user friendly systems. Ensuring there is consensus. They have worked with similar organizations in N. Dakota and Montana, so know what challenges there can be. There can be resistance to change, so they involve users/providers as much as possible so they feel fully involved. When the system rolls out they aren't surprised by anything. Involve everyone, not just leads, in developing the system.

Points Awarded 18 out of 20

Question 2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can't anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA's fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?

Comments

There solution is designed to be easy to modify, reporting requirements can change. Walking in they will already have a strong framework, but that is just the beginning. We can easily add providers, reports, policies, etc. We will be in a position where ORIA will not need new customization. They understand that the human services sphere requires flexibility and ease of modification. If they continue to provide support to us, it is good to know we won't be the only ones facing those issues, because they are working with other refugee service providers impacted by the same changes.

Points Awarded 19 out of 20

Question 3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?

Comments

It starts at the beginning with discovery sessions. What does the flow look like from beginning to end? Both the good and the bad outcomes. They need as much information up front (reports, intake forms, guides, screen shots of the existing system). They like to shadow how staff to see how they are entering things now. It allows to collect pain points, requests for efficiencies, and what is working. They like to demo the system early and often. Ensure that everyone is on the same page. Gives people something to react to. It takes a lot of time for staff. They develop a discovery plan. A timesaver will be they already have an understanding of our broad programs.

Points Awarded 14 out of 15

Question 4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA's culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?

Comments

Their goal is to be partners and not a vendor relationship. Engage and involve all stakeholders. The discovery plan has us look at who all needs to be involved. They use an agile process.

Points Awarded 13 out of 15

Question 5. How would you approach working with ORIA to accomplish our proposed schedule, from planning through migration, training and go-live? As a collaborator with our team, what are your approaches to consensus building, working through and resolving differing perspectives, so we can focus on obtaining contract goals?

Comments

What's the goal? Use the contracts to determine what needs to be done. Setting up the plan early on, which is flexible but lays the groundwork. With differing perspectives, it's helpful to bring people back to the ultimate goal. I like the mention of using the contracts as a starting point. When building consensus, look at the available options? Look at the impacts of the different choices. Looking at

pros/cons helps with addressing different perspectives. The focus is on collaboration. In South Dakota it was completely manual process (sharepoint, excel, etc) which was a challenge.

Points Awarded 9 out of 10

Question 6. What is your plan for coaching, training and supporting (i.e. technical assistance, 1:1 orientation, etc.) individuals who have differing levels of technology comfort, experience and English language proficiency? How do you ensure comprehension within your training?

Comments:

Involve users early in the process, so they aren't just seeing the final project as it's rolled out. A gradual exposure over time. User acceptance testing (post-sprint demo) which allows people to test out the system prior to finalizing it. For visual or hands on learners, it helps them get a sense of what it will be like. They never come in and say "this is our training plan", but rather they offer a menu of options which can be tailored to the various needs. Different modes of training (in-person, video, online, etc). They like to focus on small groups so they can walk through with them and not just watching a demo. Always have SMEs in the room. They talked about people thinking through their personal processes. Keeping trainings focused on "training"

Points Awarded 8 out of 10

Question 7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Comments

Sometimes people are just nervous. Sometimes sitting with people 1:1 helps people to better understand. They can do it with someone to gain confidence. With one rollout they had planned to do virtual training, but then realized in-person would be best. In North Dakota a hands on approach was the best. Going in they take various approaches. A strong understanding of the different needs and challenges of potential users.

Points Awarded 8 out of 10

ORAL INTERVIEW SCORING
July 8-11, 2024
RFP # 2323-833
ORIA Case Management and Database System

Vendor Name: Coresphere

Evaluator Number: WE4

General Guidelines:

- Please score each vendor's response without reference to the scores for other vendors. Each score should reflect your score only based on the Vendor's response in each competency area.
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The Oral Evaluation is comprised of two parts: a 30 minute bidder presentation to highlight the most effective features of bidder's product and 45 minutes of questions by the evaluation panel.

The presentation from the candidate is worth 25 points. Panel Questions will be scored as follows: .

If you have questions, please direct them to Nicole Kahle, Solicitation Coordinator. All evaluations must be returned and reviewed by the Solicitation Coordinator at the end of the evaluation.

Oral Evaluation Presentation Information:

#	Show your solution's functionality, including how it:	Yes
1	Provides an interface for many different programs.	Yes
2	Can be configured or customized in the future by ORIA.	Yes
3	Includes dashboards, which vary depending on the registered profiles, allowing users to filter or customize the dashboard to fit their viewing needs.	Yes
4	Has workflows where approvals are tracked and explain how additional workflows can be created.	Yes
5	Links within families or households, with users able to view data individually, as well as holistically at the broader family level.	Yes
6	Links individuals to all of the services, programs, service providers with which they are associated, ensuring that service levels can be viewed with each program, as well as across all programs.	Yes
7	Facilitates quality data entry from multiple users with varying degrees of familiarity with databases, English and technology to minimize the risks of users duplicating client records or making other data entry errors.	Yes
8	Includes a system for fixing errors and duplications.	Yes
9	Has the ability to flag when information is in non-compliance, in error, and/or duplicated.	Yes
10	Allows users to upload an Excel file to populate the solution and to export data out of the system.	Yes
11	Enables users to view and show the data in a variety of ways through reports.	Yes
12	Generates customized reports created ad hoc by users.	Yes
13	Retains high-level, historical data in perpetuity for reporting purposes and detailed data for up to 7 years.	Yes
14	Includes forms, which can be modified, and new forms that can be created by ORIA staff.	Yes
15	Uses e-signatures for online forms, with the ability to sign manually when needed.	Yes
16	Tracks access by users with an audit trail.	Yes
17	Allows staff to create confidential case notes for their own use and to share with others, who have correct permissions.	Yes
18	Allows service providers staff within the same organization or between/among differing providers serving the same clients to communicate, refer and coordinate services and support that can promote client's capacity to participate in ORIA services successfully.	Yes
19	Requires mandatory documents needing to be attached.	Yes
20	Includes help text to explain what fields might be confusing to service providers.	Yes
21	Has data analysis capabilities.	Yes
22	Tracks services levels and associated funding.	Yes
23	Can integrate with other systems, such as eJas.	Yes
24	Is mobile friendly application that can be run efficiently on any device.	Yes
25	Includes advanced search capabilities.	Yes

The 7 Oral Evaluation Questions are:

1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What’s going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?
2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can’t anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA’s fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?
3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?
4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA’s culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?
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7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Oral Evaluator General Notes:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Oral Evaluator Scoring:

Question 1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What's going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?

Comments

The response thoroughly addressed the questions. Multiple challenges and mitigation strategies provided.

Points Awarded 13 out of 20

Question 2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can't anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA's fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?

Comments

The response thoroughly addressed the questions. The design of the solution is future proofed as ORIA can make any modifications necessary. Additional points would have been given for more information on the project aspect.

Points Awarded 13 out of 20

Question 3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?

Comments

The response thoroughly addressed the questions. Multiple approaches to understanding user needs, including shadowing, discovery sessions, demo's often.

Points Awarded 10 out of 15

Question 4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA's culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?

Comments

The response addressed the questions. Additional points would have been given for more information on the approach.

Points Awarded 9 out of 15

Question 5. How would you approach working with ORIA to accomplish our proposed schedule, from planning through migration, training and go-live? As a collaborator with our team, what are your approaches to consensus building, working through and resolving differing perspectives, so we can focus on obtaining contract goals?

Comments

The response addressed the questions. Additional points would have been given for more information on the approach for resolving differing perspectives and migration, training and go-live.

Points Awarded 6 out of 10

Question 6. What is your plan for coaching, training and supporting (i.e. technical assistance, 1:1 orientation, etc.) individuals who have differing levels of technology comfort, experience and English language proficiency? How do you ensure comprehension within your training?

Comments

The response thoroughly addressed the questions. Multiple strategies for coaching, training and supporting provided.

Points Awarded 8 out of 10

Question 7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Comments

The response thoroughly addressed the question. Multiple examples provided on how they modified training to adjust to user needs.

Points Awarded 7 out of 10

ORAL INTERVIEW SCORING
July 8-11, 2024
RFP # 2323-833
ORIA Case Management and Database System

Vendor Name: Coresphere

Evaluator Number: 5

General Guidelines:

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Oral Evaluation Presentation Information:

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21	Has data analysis capabilities.	Yes
22	Tracks services levels and associated funding.	Yes
23	Can integrate with other systems, such as eJas.	Yes
24	Is mobile friendly application that can be run efficiently on any device.	Yes
25	Includes advanced search capabilities.	Yes

The 7 Oral Evaluation Questions are:

1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What's going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?
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7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Oral Evaluator General Notes:

I appreciate the tabs at the top- including reporting is very helpful for ORIA staff. Would have been helpful to have the demonstration include which number they were addressing, it was a bit quick and difficult to follow. Seemed to be well versed with our services and needs- came prepared.

Oral Evaluator Scoring:

Question 1. ORIA staff are not IT experts. In addition, we work with multiple service providers through our 20+ programs. What's going to be the most difficult part of guiding ORIA staff and providers to success and how is your company uniquely positioned to get us through this? How would you plan to work with us to overcome the challenges and mitigate the risks you have identified?

Comments

Very aware that ORIA staff are not IT experts- have an idea of the challenges – if user interface is friendly then it will translate to friendly training solution- focused on human centered design which was evident throughout presentation. Build consensus and collaboration- involve users throughout the process to collaborate and get buy in- want them fully involved- by the time the system roles out, they are not surprised.

Seem to have a thoughtful and inclusive approach-robust discovery process demonstrates understanding of needing to get everyone on board.

Advantage- comfortable with Refugee services- they seem prepared and well aware of our needs.

Points Awarded 15 out of 20

Question 2. ORIA has seen rapid growth in client enrollment (from 5,500 people served in 2021 to over 25,000 in 2023). This growth has led to the need to expand the number of programs and service providers. In addition, we experienced a dramatic increase in service and reporting requirements. We can't anticipate needs and requirements accommodated today will stay constant moving forward. Given what you learned in the RFP and know of ORIA's fluid environment with shifting Legislative and refugee needs, how will you walk with us through this project to ensure the solution meets our needs today and in the future without jeopardizing the budget, scope or schedule?

Comments

Focus on the need to evolve – seem to really understand that the solution will not work if it does not evolve. System is designed with drag and drop for changes to new fields, new requirements for reporting, etc.- seems very user friendly

Addressed future needs which I think is huge. They are aware of legislative changes through other customers also reporting to ORR for refugee services.

Points Awarded 13 out of 20

Question 3. Users of your Solution would be diverse. How would you work with us to fully understand user needs and stories, and confirm and incorporate requirements to ensure your Solution meets the needs of our diverse stakeholders, users, programs and services? What support from ORIA staff and how much time in the schedule would you need to fully identify and understand what users require in a case management system to ensure clients are given the services they need?

Comments

Discovery sessions to meet with each program and their staff to understand the flow- appreciate their focus on information gathering to fully understand programs. – understand nuances – they shadow staff- provides a more holistic view- get narrative- pain points, what's working well, identify areas to become more efficient

Their approach seems very holistic, thoughtful and based in experience
Showcase early and often- seems like we will be kept aware of progress- continuous, iterative process

They want lots of time- setting expectation – they are aware that ORIA staff will be balancing day to day tasks which I appreciate – help us plan ahead- get within cadence of meeting

Keeping track of decisions and documenting meetings seems key in such a major undertaking

Points Awarded 9 out of 15

Question 4. ORIA has a collaborative and inclusive work culture. How do you envision your company aligning with ORIA's culture and environment? How would you approach building a collaborative project team with representation from stakeholders, ORIA staff and service providers?

Comments

Small to mid size company- diverse set of employees- top work place last five years – culture of collaboration – want to be partners – thoughtful about who to involve – want everyone to feel they are part of overall approach

I like their approach to including all voices- I think service providers will need to feel involved and engaged for this to be successful.

Points Awarded 9 out of 15

Question 5. How would you approach working with ORIA to accomplish our proposed schedule, from planning through migration, training and go-live? As a collaborator with our

team, what are your approaches to consensus building, working through and resolving differing perspectives, so we can focus on obtaining contract goals?

Comments

Want to identify upfront what is the goal- contract can guide it but may need to dig further – how can we get that done? – plan out each stage so we know what to expect at each stage- seems very transparent and focused on open, clear communication

Differing perspectives but as long as we have a north star can be helpful in moving past differences- experience with aligning decision making

Points Awarded 7 out of 10

Question 6. What is your plan for coaching, training and supporting (i.e. technical assistance, 1:1 orientation, etc.) individuals who have differing levels of technology comfort, experience and English language proficiency? How do you ensure comprehension within your training?

Comments Important to involve users early so the training is not the first day they see the system- aware of how this may be jarring onboarding so they approach it thoughtfully and involve people in a variety of ways- want to set people up for success. – involve users in testing the system for additional exposure- have a variety of ways to engage different learning styles

Understand needs of users ahead of time – offer a menu- what do you need or what to focus on? – involves learners in determining training focus/style

In person, online, user manuals, videos, train the train, cheatsheets- apply to variety of learners- meet the needs of most-small groups- really thoughtful and diverse approaches

Points Awarded 8 out of 10

Question 7. Can you provide an example of a time when you implemented training and the learners did not grasp how to use the platform? How did you pivot or adjust to ensure all learners fully understood the concept/how to use your solution?

Comments

“There has not been a situation where learners did not grasp it at all”- by learning the different approach- various teaching styles- fairly effective – there have been challenges, get feedback or use train the trainer, offer additional support or training

Look internal if no one is understanding the training

Repetition is helpful, trying to use examples, diagrams or visuals are helpful

Will sit side by side with someone to enter the actual data- work one on one through data- they take a hands on approach and offer alternative ways to learn.

Points Awarded 7 out of 10