**State of Indiana**

**RFP 410-26-85803**

**988 Software**

**Attachment F — Technical Proposal**

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| **Respondent:** |  |

**Instructions:**

Request for Proposal (RFP) 410-26-85803 is a solicitation issued by the State of Indiana in which organizations are invited to compete for a contract amongst other respondents in a formal evaluation process. Please be aware that the evaluation of your organization’s proposal will be completed by a team of State of Indiana employees, and your organization’s score will reflect that evaluation. The proposal evaluation can only be based on the information provided by the Respondent in its proposal submission Sections 1 through 19. Therefore, a competitive proposal will thoroughly address all components of Attachment K - Scope of Work.

Technical proposal specifications are listed in Section 2.4 of the RFP main document. Please review the requirements in Section 2.4 carefully. Respondents are encouraged to submit proposals addressing DMHA’s goals that go beyond the general requirements set forth in Attachment K of this RFP. For all areas in which subcontractors will be performing a portion of the work, clearly describe their roles and responsibilities, related qualifications and experience, and how you will maintain oversight of the subcontractors’ activities.

Respondents should insert their text in the provided boxes below the questions/prompts. Respondents are allowed to reference appendices or exhibits not included in the boxes provided for the responses, so long as those materials are clearly referenced and described in the boxes in the template. The boxes may be expanded to fit a response. Every attempt should be made to preserve the original format of this form. A completed Technical Proposal is a requirement for proposal submission. Failure to complete and submit this form may impact your proposal’s responsiveness. Please limit your response to 150 pages or less, not including any appendices.

**1.0 Introduction**

1. Provide an executive summary of your technical proposal and overall response to this RFP. Your response must include the following:
   1. An overview of your organization, including mission, history, and how your experience aligns with behavioral health and crisis system technology needs.
   2. A high-level description of your proposed System, emphasizing how it will assist the State and 988 Contact Centers in managing calls, chats, and texts made to Indiana 988.
   3. A statement demonstrating your understanding of Indiana’s 988 Crisis Response System and the role of your System in supporting effective, coordinated crisis care.

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1. Confirm you have carefully reviewed all requirements listed in Attachment K. Should your company have any exceptions, substitutions, or conditions for the State’s consideration, please list them below. The State will not accept exceptions, substitutions, or conditions introduced after award, during contract finalization and implementation.

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1. If applicable, identify the subcontractors performing any portion of the work detailed in Attachment K. Please be sure to clearly describe their roles, responsibilities, related qualifications, relevant experience, and how you will maintain oversight of the subcontractors’ activities.

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1. Please provide a list of states in which you currently provide, or have in the past provided, similar services. In connection with this list, please provide information on:
   1. Projects you have initiated in other states that can be replicated in Indiana to help the State meet its goals
   2. Projects you intend to initiate that would be specific to Indiana
   3. Examples of how you have worked with other states in a collaborative manner to address changing needs and priorities
   4. Any sanctions or formal complaints that you have been subject to, and the resolution
   5. Any corrective actions that you have been subject to, and the resolution

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**2.0 Overview and Vision of 988**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 2.0 of Attachment K. Your response should:
   1. Describe your experience working with systems like the national 988 Suicide & Crisis Lifeline.
   2. Explain how you have navigated meeting the requirements of federal partners, such as the National 988 Lifeline Administrator (currently Vibrant Emotional Health) while meeting the expectations of state-level systems.
   3. Explain your understanding of Indiana’s 988 Crisis Response System, including its core pillars (Someone to Talk To, Someone to Respond, and A Safe Place for Help) and how your proposed System supports the State.
   4. Describe your understanding of the current CRM system used by Indiana’s 988 Contact Centers and any limitations you aim to address.
   5. Describe your vision for how your System can evolve alongside the State’s long-term plans for system integration, interoperability, and scalability.

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**3.0 Definitions**

1. Confirm that you have read and understand all definitions listed in the RFP Main Document and Section 3.0 of Attachment K.

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1. Please list any additional terms and definitions used by your company or industry that you would like the State to consider incorporating in the contract. The State will not accept terms and definitions introduced after award, during contract finalization, and implementation.

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**4.0 Mandatory and Desired Respondent Qualifications**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 4.0 of Attachment K. Your response must include:
   1. Demonstration of prior experience implementing and maintaining a CRM for a Health and Human Services agency.

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1. Describe if and how your organization meets the desired qualifications outlined in Attachment K.

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**5.0 Required System Functionalities**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 5.0 of Attachment K, and, therefore, Attachment L.

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1. Describe how your System meets the requirements in the Contract Record tab of Attachment L.

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1. Describe how your System meets the requirements in the Data and Reporting tab of Attachment L.

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1. Describe how your System meets the requirements in the Follow-Up tab of Attachment L.

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1. Describe how your System meets the requirements in the General Requirements tab of Attachment L.

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1. Describe how your System meets the requirements in the Referral and Dispatch tab of Attachment L.

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**6.0 Compliance with Privacy/Security Standards & Regulatory Requirements**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 6.0 of Attachment K.

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1. Please describe in detail the practices and policies you will put in place to best ensure data security and privacy, including, but not limited to, how you will comply with the Indiana Office of Technology (IOT) and HIPAA.

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1. Confirm the State’s ownership of data within your system and describe your data retention and deletion policies.

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**7.0 Certification**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 7.0 of Attachment K.

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1. Describe your system’s readiness to support Centers for Medicare and Medicaid Services (CMS) certification, including documentation, traceability, and audit compliance features. Describe your familiarity with MITA frameworks and documentation.
   1. Provide documentation if applicable.

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1. Describe how your organization will support the State during CMS certification review activities.

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**8.0 State Audits**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 8.0 of Attachment K.

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1. Describe your plan to cooperate with State audits, including timely access to documentation, facilities, and data while ensuring confidentiality and compliance with all legal requirements.

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**9.0 Project Management**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 9.0 of Attachment K.

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1. Describe how your organization will coordinate and collaborate with DMHA and other stakeholders.

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1. Provide an overview of how your organization will support and attend mandatory State-required meetings and provide examples of how you will share those updates and decisions.

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**10.0 Plans and Procedures**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 10.0 of Attachment K.

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1. Provide a high-level proposed Project Plan and description of your project management approach.
   1. Outline project milestones, deliverables, and monitoring procedures.
   2. Describe tools or frameworks you will use.
   3. Describe the project governance structure.
   4. Describe how the project management approach will evolve over the term of this Contract.

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1. Describe how your organization ensures adherence to contractual and regulatory standards through a Compliance Plan.

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1. Describe how system updates and change requests will be managed in accordance with the Change Control Plan requirements.

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1. Explain your process and plan for tracking and resolving issues in accordance with the Issue Resolution Plan requirements.

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1. Describe your risk identification, mitigation, and contingency strategies in accordance with the Risk Management and Mitigation Plan requirements.

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1. Describe your process for gathering and validating requirements in accordance with the Requirements Plan requirements. Explain how you will ensure State approval.

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1. Describe your approach to business continuity and disaster recovery in accordance with IT Business Continuity and Disaster Recovery Plan requirements. Explain how your system ensures continuity during outages or emergencies.

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1. Describe how you will comply with the User and Operating Procedures Manuals requirements. Describe the process for developing and updating these documents. Explain how you will ensure they are always up-to-date.

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1. Describe how you will comply with the Data Dictionary requirements. Describe your process for updating this document on a regular and ad hoc state, ensuring it remains up-to-date.

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1. Describe a high-level staffing plan for this project in accordance with the Staffing Plan requirements. Describe how you will ensure that turnover does not cause adverse effects for the State and the System functions.

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**11.0 Reporting**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 11.0 of Attachment K.

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1. Describe your approach for managing and maintaining the following reports, including how you will ensure all reports are submitted in an accurate and timely manner:
   1. Monthly Status Reporting
   2. Monthly Service Levels Reports
   3. RAID Log
   4. Any ad hoc reports requests by the State and Federal entities

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1. Provide any relevant example reports.

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**12.0 Start-of-Contract Transition**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 12.0 of Attachment K.

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1. Outline your proposed plan to transition from the current 988 Software System to your organization’s System. Describe how you will ensure the State does not experience any adverse effects during the transition.

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**13.0 Design, Development, and Implementation (DDI)**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 13.0 of Attachment K and how these activities shall be completed in accordance with the plans outlined in Section 10.

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1. Outline your approach to DDI of the System detailed in Attachment K.

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**14.0 Testing**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 14.0 of Attachment K.
   1. Describe your comprehensive testing strategy, including an approach to testing prior to initial go-live as well as testing prior to the release of enhancements
   2. Describe how you will ensure that DMHA has the opportunity to test all upcoming changes in the UAT environment prior to implementation into production.

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**15.0 Training**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 15.0 of Attachment K.

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1. Describe your approach to developing and delivering initial training for System users. Include training methods, frequency, training material maintenance, and evaluation of training effectiveness.

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1. Describe your approach to developing and delivering ongoing training and support for System users. Include training methods, frequency, training material maintenance, monitoring, and evaluation of training effectiveness.

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**16.0 Readiness Review and Go-Live**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 16.0 of Attachment K.

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1. Describe your process for conducting readiness reviews prior to go-live, ensuring the System, staff, and data are prepared for transition to production.

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1. **Maintenance and Operations**
2. Confirm your understanding of, and agreement with, the requirements outlined in Section 17.0 of Attachment K.

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1. Describe your approach to maintaining and operating the System after Go-Live including ongoing support. Your response must:
   1. Describe your HelpDesk support.
   2. Describe your approach to enhancements and releases, including how you will ensure the State is provided accurate release notes and is aware of changes to production.

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1. Describe how you will comply with the Warranty described in Section 17.2 of Attachment K.

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1. Outline your process of notifying the State of unplanned outages in line with the expected communication timelines in Section 17.3 of Attachment K. Describe your process for timely resolution and Root Cause Analysis.

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1. Describe how you plan to adhere to the State’s expectations for severity codes, response phases, and response and resolution timelines as identified in Section 17.4 of Attachment K.

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1. Describe your process for updating and enhancing the System to comply with new or revised Federal and State standards.

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**18.0 End-Of-Contract Requirements**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 18.0 of Attachment K.

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1. Describe how you will comply with the end-of-contract requirements described in Section 18.0 of Attachment K and facilitate a seamless transition from the services you provide. Describe how you will ensure the State does not experience any adverse effects during transition.

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**19.0 Service Levels and Performance Withholds**

1. Confirm your understanding of, and agreement with, the requirements outlined in Section 19.0 of Attachment K.

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1. Describe your approach to achieving Go-Live by the agreed upon date and avoiding payment reductions.

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1. Describe your approach to achieving and maintaining the Maintenance and Operations Service Level Agreements as defined in Section 19.3 of Attachment K. Explain your internal processes for monitoring and reporting M&O performance.

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1. Describe how you will comply with the System Enhancements Service Level Agreements as described in Section 19.4 of Attachment K.

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