**OFFEROR’s SOLUTION**

For the version of the solution you are proposing, provide the following information:

Proposed Solution

1. Describe your proposed solution based on EUTF’s requirements as stated in this RFP.
2. Describe your BAS product roadmap for the next 5-10 years. Please indicate how your proposed solution will take advantage of government cloud services and technologies.
3. Is there a planned sunset date for your proposed solution within the term of the contract? If so, describe the potential replacement solution.
4. Provide a 10-year retrospective product roadmap of the proposed solution. EUTF is interested in understanding how the proposed solution have been enhanced and upgraded.
5. For each Key Functional Area listed in the Appendix B, *Functional Requirements*, draft a maximum 5-page response that explains in clear, non-technical language how the proposed solution performs the process. Include a brief narrative description of how your solution complies with the requirements in Appendix B, *Functional Requirements*, which are organized by the same Key Functional Areas. Provide examples of how your proposed solution could improve EUTF operations; for example, by reducing processing time, reducing of errors, or enhancing customer service. Also, include the information you believe EUTF will find useful in evaluating the strengths of your solution.
6. Indicate any additional functionality that is not specified in the Functional Requirements but is part of your proposed solution.
7. Describe how the proposed solution supports FOIA initiated Electronic Stored Information (ESI) searches, legal discovery, and legal holds.
8. Describe how the proposed solution supports the timely and secure archival of records from the proposed solution as may be required by record retention policies.
9. Provide a short video capture session (in any standard readable format) that demonstrates an overview of the proposed solution. The objective of this video capture session is for EUTF to experience the general “look and feel” of the solution, to get a sense of the basic navigation, and to see how a few of the screens operate from the user’s point of view. The video capture session must be between 5 to 10 minutes in length per scenario with either oral or written narration, which will explain what is being shown in the video capture. Offeror will demonstrate the following capabilities of the proposed solution in the video captures the following system capabilities: ECM, Workflow, Imaging, ad hoc query, ad hoc report, and CRM. A single video capture session may include multiple capabilities.

Scenario 1 – Member Portal Experience; a) for a new hire, including insurance enrollment, designating beneficiaries, entering dependent information, b) for an active member, navigate through typically available options, and c) for a retired member, navigate through typically available options.

Scenario 2 – Employer Portal Experience; remit contribution payments, submit files, manually view/enter information, run/view standard reports.

Scenario 3 – Enrollment and Termination; in the line of business application, a) complete enrollment for a new hire, including insurance enrollment, designating beneficiaries, entering dependent information, and b) complete a termination for an active employee.

Scenario 4 – Account Management; a) show account detail (debits and credits) for a member, employer, and carrier, and b) process a refund for a member (due to overpayment of premiums)

Scenario 5 – Running Reports; show the basic process for generating pre-defined reports and run some standard Accounting reports (e.g., daily cash receipts, payable and receivable aging reports, etc.)

Scenario 6 – Running Queries; show the process for creating and running user-defined queries

Solution Customization/Configuration

1. To provide EUTF an understanding of the degree of customization and/or configuration of the proposed solution, complete the two blank columns for each of the requirements in both Appendix B, *Functional Requirements* and Appendix C, *Technical Requirements*.

In the first blank column (“Degree of Customization”), place an indicator (A, B, C, or D) that specifies the primary method for meeting each requirement in the proposed solution. Use only the values A, B, C, or D, based on the descriptions below. Select the option that most closely reflects how the requirement will be delivered.

The second blank column (“Comments”) may be used to add any relevant comments concerning how each requirement will be met. No changes may be made to the original information provided in Appendix B, *Functional Requirements* or Appendix C: *Technical Requirements*.

1. **Configuration**. Existing system functionality will be configured to deliver the requirement. This includes setting of parameter values, updates to factor and value tables, updating rules engines, and selection from any available configuration options within the existing software release. Configuration changes would not be expected to have any impact on future software updates.
2. **Minor Customization**. To meet the requirement, existing functionality will be modified to incorporate unique EUTF customizations not within the existing software release. This includes customization within well-defined exit/entry points within the system, interface file format definitions, custom formulas, custom SQL or SQR code for queries or reports, and addition/modification of data fields. Minor Customizations would not be expected to have an impact on future software updates.
3. **Major Customization**. Existing functionality to meet the requirement does not currently exist within an existing module, feature, or system component. This includes EUTF-specific extensions/enhancements/customizations to existing functionality, EUTF-specific APIs, protocols, or standards, and back-porting features from another version of the system. These are customizations that would not normally be reviewed or tested by the Contractor as part of their general system or product release testing and validation. Special care would be required to ensure compatibility with future software updates.
4. **Other** (describe in comments). Existing functionality to meet the requirement does not currently exist and would require either a new functionality be added to the System, e.g., a new module, feature, or system component, the use of third-party technology specifically to meet EUTF’s requirement, or the requirement will be met outside of the System either manually or with a standalone tool.
5. Describe in detail the Application architecture of the proposed solution. Describe how the proposed solution will enable:
6. Ease of integration with existing software Applications and software tools;
7. Reuse of existing software Applications and software tools;
8. Ease of deployment of new modules and additional or enhanced functionality;
9. The parameter-based and effective-date-driven configuration of EUTF’s business rules;
10. Externalized business rules, (e.g., using iLOG or other rules engine), so that it will be easier to setup new business rules;
11. Scheduling of jobs, reports, and generation of various export files;
12. Application logging at a level sufficient for EUTF staff to perform auditing, security, and debugging activities as necessary; and
13. Support for web technologies used in the user interface, as well as these technologies’ ability to handle web interface vulnerabilities (e.g., XSS).

Discuss any risks and benefits associated with the products suggested. As with all components of the architecture, EUTF views technical support, available skills, long-term viability, interoperability, flexibility, and adherence to relevant standards as potential differentiators in a long-term solution. Explain how your proposed solution would meet these objectives.

1. Describe the process used to modify rules or variables. Specifically, describe any scripts, menus, screens, and tools that will be provided to configure the system’s parameters, values, and rules.
2. Describe the proposed approach to integration, including a discussion of open Application Programming Interfaces (API), and other modular architecture-based techniques that will enable integration, and communications between different Applications and platforms.
3. Describe in detail the proposed modular architecture, including the use of service interfaces to software components (service implementations), and support for commonly accepted, standards-based protocols to ensure continued technical viability, and improve technical agility. Explain in detail named programming specifications, such as Web Services Description Language (WSDL) and Business Process Execution Language (BPEL).
4. Explain the degree to which the proposed solution adheres to component-based architecture, re-usable software blocks, and the effective use of modular architecture. The Offeror must also explain the approach to securing transactions across the component architecture.
5. Describe how the architecture makes use of named types of tools, such as Enterprise Service Buses (ESBs) or Business Process Management (BPM) tools.
6. Explain how the proposed integration architecture facilitates the introduction of any new Applications to incorporate them into EUTF current or future integration architecture.
7. Provide visual depiction(s) of the proposed integration architecture. Any interim integration architecture(s) different from the final integration architecture necessary to support phases prior to full implementation must be described and visually depicted in detail.
8. Provide a description of how an easily-configurable mechanism for adding new input/output file forms and transmission of channels would be configured and implemented. Include a sample interface strategy document.
9. Describe how the proposed solution provides for a single point of management for all the system interfaces within the solution environment, such as an “interface gateway” that provides a single point to manage design, execution, security, performance, monitoring, and documentation. Please describe the built-in functionality within the proposed solution (and include screen prints) for interface monitoring including the ability to check the status of the interfaces, error processing, and resubmitting upon correcting errors.
10. EUTF defines software maintainability to be the ease with which the solution can be modified to correct faults, improve performance, or adapt to changes in the environment (e.g., statutes and regulations). Explain how the proposed solution provides software maintainability.
11. EUTF defines hardware maintainability to be the ease with which the hardware for the solution can be maintained. Explain how the proposed solution meets this objective, where existing hardware is easily maintained, or new hardware can be easily integrated into the solution to support business needs or changes in technology.
12. If the proposed solution does not currently support WCAG 2.1 accessibility guidelines, provide a product roadmap that indicates when this capability will be implemented.
13. If the proposed solution does not currently support Responsive Web Design, provide a product roadmap that indicates when this capability will be implemented.

Track Record with the Solution

1. Provide ten representative examples where the proposed solution has been implemented or is being implemented at other locations. For each example, provide:
2. Client name;
3. Approximate number of members;
4. Approximate number of employers;
5. Number of health and welfare plans;
6. Product version;
7. Name of Hosting provider/service; and
8. Whether the solution currently is in production. If yes, provide the year the solution went live.
9. Provide a list of every location where the recommended product version being proposed to EUTF has already been implemented or is being implemented.
10. Give one example of a successful implementation with the proposed solution. What made the project work well?
11. Give one example of a challenging implementation (e.g., a terminated implementation, one that was more than six months late receiving acceptance, or over budget). What happened? What were the lessons learned?

Technical Questions

1. **Application Architecture**
2. If Open Source Software is used, describe:

(i) How it is used in the proposed solution;

(ii) How it is tested, certified, and supported as part of the proposed solution;

(iii) How it is monitored, tested, and patched for security vulnerabilities; and

(iv) How it is licensed.

(v) Provide a copy of each Open Source license

1. Describe how the proposed solution’s information architecture meets the following objectives:

(i) Insulate transaction-processing systems from the large ad-hoc queries that are required by analytical processing systems;

(iii) Provide a cross-organizational view of data; and

(iv) Provide access to data not found in transaction systems, including summary data, historical data, and external data.

1. Describe the Database Management System used in the proposed solution and also discuss to what extent is the database normalized or de-normalized.
2. Describe how the proposed solution is architected to take advantage of rollback, roll-forward, and deadlock avoidance.
3. Explain how the unstructured data elements are handled. The unstructured data might include information found in correspondence, imaged documents, email, forms, reports, etc.
4. Describe how the proposed solution’s architecture provides a non-disruptive means for growth and for handling seasonal peaks of volume and utilization.

1. Outside of its use of an RDBMS, describe the data formats and data languages used in the proposed solution to support data presentation and exchange. The following, at a minimum, must be discussed:

(i) The use of Adobe Acrobat Portable Document Format (PDF) for non-editable electronic documents (except images which may be stored in the TIF format specified elsewhere in this RFP);

(ii) The use of the most recent version of XML when capturing or authoring document content that requires further automated processing by other information systems and web-based clients using standard XML browsers;

(iii) The ability to import or export standard comma-delimited files;

(iv) Shared disk files; and

(v) Describe the Database Connectivity Standards are used by the proposed solution (e.g. ODBC compliance, JDBC).

1. Include the following key artifacts in the proposal:

(i) Data structure/logical data model utilized in the solution being proposed;

(ii) Data schema diagram;

(iii) Data dictionary (including table descriptions, field or column definitions and types, defined keys, and value domains); and

(iv) Draft Data schema definition for use by EUTF in using the ad hoc query and reporting capability.

1. Describe how the proposed solution’s User Interface (UI) complies with the principles of responsive design.
2. Describe how the proposed solution’s UI provides for a user-centric and workflow-driven user interface.
3. Describe how new APIs are added to the proposed solution for either internal or external use.
4. Provide a brief narrative description of how your solution complies with the technical requirements in the Application Architecture section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
5. **Audit/Logging**
6. Include sample audit reports and audit logs in the proposal.
7. Describe how the proposed solution will integrate with Splunk or similar log aggregation tool.
8. Provide a brief narrative description of how your solution complies with the technical requirements in the Auditing/Logging section of Appendix C: *Technical Requirements*. Also, include the information you believe EUTF will find useful in evaluating the strengths of your solution.
9. **Security**
10. Explain the proposed Security architecture. Outline details surrounding the security architecture to ensure secure communications between the clients located in EUTF and the system that is hosted at the Government Cloud Services Subcontractor location.
11. Describe the hosted architecture and the secure means that will be used by EUTF to access and administer the System remotely.
12. Explain how the security will enable efficient processing and operations while concurrently protecting against any and all security breaches or violations of the protocol.
13. If parts of the proposed solution will be accessed via a web browser outside of EUTF’s internal network, explain how the secure communication between web servers and web browsers will be handled. Include a detailed description of all security and safety measures.
14. Discuss how any Applications served over the web to users outside the EUTF network would be served via encrypted https and protected with appropriate credentials. This applies to portal users and EUTF staff accessing the Application from an outside facility.
15. Describe how the proposed solution integrates with the directory service infrastructure (Microsoft Active Directory) and supports Lightweight Directory Access Protocol (LDAP) capabilities.
16. Describe the security standards implemented in the proposed solution. Explain how the maintenance and usability of any standards supporting EUTF security architecture are easy to use, unambiguous, and comprehensive.
17. Describe how the architecture permits use of the comprehensive system required to provide public-key encryption and digital signature services, also known as a public-key infrastructure (PKI).
18. Describe how the proposed solution complies with federal law and applicable State statutes with regard to “electronic signatures” and alternate means of authentication. You must explain the capabilities of electronic signatures in the proposed solution.
19. Describe how the proposed solution integrates with third-party Security Information and Event Management (SIEM) tools.
20. Describe how the proposed solution is compliant with NIST 800-53.
21. Describe how the proposed solution is compliant with FIPS 140-2.
22. Provide a brief narrative description of how your solution complies with the technical requirements in the Security section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
23. **Configuration**
24. Describe how the proposed solution supports configuration.
25. Provide a brief narrative description of how your solution complies with the technical requirements in the Configuration section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
26. **Infrastructure**
27. Include the list of recommended hardware and software to support the proposed solution that accommodates the estimated total end users and concurrent users and the increase in end-user activity as noted in the technical requirements. The list of hardware and software components and accessories must include all components (e.g., servers, printers, cables, connection equipment, routers, and storage devices) to fully implement the solution. That list must include all the hardware and software components that will be required to support the proposed environments (including but not limited to Production, Production – DR Instance, Pre-Production, Reporting, Training, User Acceptance Testing, Test and Development environments) for use. The hardware and software products specified must meet RFP requirements. The list of software must include the type of license. The hardware and software products specified must also support EUTF’s post Go Live support of the proposed solution. ***PLEASE DO NOT INCLUDE ANY COST INFORMATION IN THE TECHNICAL PROPOSAL RESPONSE. INCLUDE COST INFORMATION ONLY IN*** ***ATTACHMENT 2, OFFER FORM OF-2 AND APPENDIX D, COST PROPOSAL WORKBOOK***.
28. Include an explanation of the recommended number of servers. Also include the following information with each server:

 (i) Processor speed;

(ii) Number of processors needed by the server;

(iii) Memory and disk cache; and

(iv) Storage requirements.

Offeror must also include other necessary miscellaneous hardware (racks, keyboard/video/mouse) relating to servers.

Describe how the proposed hardware is capable of expansion to support future functionality.

Please note Offeror’s List of Hardware must also be included in Appendix D, *Cost Proposal Workbook*.

1. Describe the storage technologies and an estimate of storage type and size required to support the proposed solution. You must address the intended use of the technology as it relates to the specific data types including production database, images, archived report data, correspondence, and CRM support.

Describe the performance characteristics and why those characteristics are sufficient for the proposed use of the technology.

Discuss industry standards/best practices associated with this storage technology for backup and recovery, failover, and stability.

1. Include recommendations and requirements for any other hardware accessories and equipment, including the need for high speed, simplex and duplex, large capacity scanners, and portrait and landscape printing capabilities. The scanning equipment must be capable of meeting all of the technical/functional requirements outlined in the RFP
2. Explain your print output management approach and built-in proposed functionality to accommodate high volume print jobs.
3. Provide a schematic/network diagram of all platforms, servers, network equipment, and all similarly related infrastructure. Also, explain how these artifacts will be developed and maintained by an automated tool or package, delivered to EUTF, and maintained by the Offeror.
4. Include recommendations on the type of workstations (desktop PCs) needed to support the proposed solution. The Offeror must note that their response to this question is only a recommendation for changes or upgrades required to EUTF current desktop PCs required to support the proposed solution. Any such changes or upgrades must not be included in the Projected List of Hardware in the Technical Proposal and the Business Proposal.

Include the following details:

(i) Processor speed;

(ii) Number of processors needed by PC;

(iii) Memory;

(iv) Disk cache and local disk space; and

(v) Any specific software requirements (e.g. OS, word processing Software).

1. Describe the full suite of development and maintenance tools that will be used by the programmers in developing and maintaining the proposed solution.
2. Describe the minimum networking and bandwidth requirements that EUTF will need to be able to access the proposed solution at the Cloud Services Subcontractor.
3. Describe the proposed solution’s backup strategy and frequency of backup.
4. Describe how your proposed solution will recover work-in-progress in the event of a system failure.
5. Describe how the infrastructure of the proposed solution is designed such that reporting will not impact production performance.
6. Please indicate whether the proposed cloud hosting environment is FedRamp High certified. If not, have plans to become FedRamp High certified within the next two years?
7. Provide examples where the proposed solution has been implemented or is being implemented in a Government Cloud environment. For each example, provide:
8. Client name;
9. Approximate number of members;
10. Approximate number of employers;
11. Number of health and welfare plans;
12. Product version;
13. Name of Hosting provider/service; and
14. Whether the solution currently is in production. If yes, provide the year the solution went live.
15. Provide a brief narrative description of how your solution complies with the technical requirements in the Infrastructure section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
16. **Interfaces/Integration**
17. Describe how the proposed solution is compliant with all National Automated Clearing House Association (NACHA) requirements for electronic transactions (EFTs, ACHs, and others).
18. Does the proposed solution employ any type of “middleware”? If so, provide the name of the middleware and indicate whether EUTF will have to purchase any licenses.
19. If your proposed solution has call center integration, provide examples of how this integration is implemented. Specifically indicate:

(i) “Screen pop”;

(ii) Read/Write API calls to an Integrated Voice Portal;

(iii) Self Service initiated agent chat sessions;

(iv) Self Service initiated video agent conferences;

(v) Self Service initiated scheduled agent callbacks;

(vi) Self Service initiated messaging;

(viii) Mobile app-initiated agent chat;

(ix) Mobile app-initiated video agent conferences;

(x) Mobile initiated scheduled agent callbacks;

(xi) Mobile initiated messaging; and

(xii) How “configurable” is the integration.

1. Describe how your proposed solution will integrate with a unified communications service for self-service and mobile initiated messages.
2. Indicate all supported file formats.
3. Describe how the proposed solution supports the scheduling of counseling sessions and other such appointments with EUTF staff by members and employers.
4. Describe how the proposed solution will integrate with 3rd party administrator web portals.
5. Provide a brief narrative description of how your solution complies with the technical requirements in the Interfaces/Integration section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
6. **Operational**
7. Describe how the proposed solution is architected to avoid overnight, weekend, or otherwise off-hour processing.
8. Describe how you are planning to provide EUTF access to nonproduction environments (development, test, staging, and other environments) during implementation.
9. Describe how the proposed solution will achieve the desired response time and performance requirements.
10. Describe how response time will be measured and reported to EUTF. Include sample reports and dashboards in the Proposal.
11. List any tools necessary to periodically test the System’s operational performance.
12. Describe how the proposed solution will handle concurrent processing without impeding any aspect of EUTF’s operations or day-to-day business.
13. Discuss how the proposed solution addresses scalability issues. You must address how you have considered not only future load, but also potential functionality not presently considered by EUTF.
14. Describe what planned outages are required by the solution, including production changes, scaling up/down, and routine maintenance. Describe the planning for installation, configuration, tuning, and similar or related activities during evening and weekend hours as needed to ensure there will be a minimum of downtime of EUTF’s normal production activity.
15. Describe what types of recovery strategies are available and what levels of recovery you are equipped to solve. This discussion must cover:

(i) Services offered for recovery protection (i.e., 24-hour emergency coverage);

(ii) The response protocol in the wake of malfunctions covering every step from repair to replacement;

(iii) Restoration and recovery procedures;

(iv) Tools used to recover the database and Application to a known state;

(v) High Availability – For isolated server failures: Windows crash, RAID controller failure, SQL or Windows patch fails, C drive full, bad memory chip, wrong box unplugged;

(vi) Disaster Recovery – For widespread outages: Data center power or network outage, domain controller failure, SAN failure, fire or earthquake; and

(vii) Human Error – For SQL error: DELETE without a where clause, a bug in the stored procedure for updates, and for end-user needing a restore due to human error.

1. Describe the batch processing approach for the proposed solution. Describe any special batch processing for big jobs. Describe the full breadth of batch processes, along with the reasons for these batch jobs. For each job, list the estimated impact on normal EUTF operations.

Also, explain how the batch processing will not negatively impact day-to-day operations.

1. Provide sample system activity logs in the proposal.
2. Provide a brief narrative description of how your solution complies with the technical requirements in the Operational Requirements section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
3. **Installation/Configuration**
4. Indicate for a minimum of how many years the proposed solution will remain a viable BAS from the time of System Acceptance.
5. Explain how you are planning to establish system security measures necessary to protect operations against unauthorized internal or external access to the communications, servers/platforms, or operating system infrastructure.
6. Indicate the type of documentation, in addition to those specified in the requirements, that will be provided during the Project.
7. Which automated configuration management tools have you used in similar projects and which tool do you propose to use on this Project?
8. Provide a brief narrative description of how your solution complies with the technical requirements in the Installation & Config section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
9. **Reports**
10. Describe how the reporting functionality is implemented in the proposed solution. Also discuss how forms, letters, and e-communications are created and incorporated into the proposed solution.
11. Describe any additional tools, including ad-hoc query development tools. Also, discuss the use of any third-party software applications or other reporting tools integrated into the solution.
12. Describe the level of expertise that is needed by EUTF staff to create a new report or query.
13. Describe how dashboard functionality is implemented in the proposed solution.
14. Describe how the proposed solution would support a data mart or otherwise de-normalized database for end-user reporting and analytics. Specifically describe how the proposed solution would merge data from 3rd party sources.
15. Provide a list of every location where the recommended product version being proposed to EUTF has already been implemented or is being implemented using a data mart or data warehouse.
16. Describe whether the proposed system will facilitate the creation of anonymized data from a production data source when populating the data mart.
17. Describe which 3rd party Business Intelligence and data visualization tools are supported. Describe any pre-built templates included in the proposed solution.
18. Provide a brief narrative description of how your solution complies with the technical requirements in the Reports section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
19. **Imaging/Workflow**
20. Provide a detailed explanation of how your proposed solution would integrate with EUTF’s Kofax ECM solution.
21. If the proposed solution is capable of integration with EUTF’s Kofax ECM solution, provide a list of every location where the recommended product version being proposed to EUTF has already been implemented or is being implemented using Kofax as the ECM solution.
22. Describe the advantages and disadvantages of using EUTF’s Kofax ECM vs. another ECM solution. Indicate which ECM solution you feel would be in EUTF’s best interest to use. Describe why the proposed ECM solution was recommended.

As applicable, indicate the cost of integration with EUTF’s Kofax ECM and the cost of an alternative ECM solution in Attachment 2, Offer Form OF-2. It is EUTF’s intent to understand the cost difference between the two approaches. ***Please do not include any cost information in the Technical Proposal response.***

1. Describe the proposed Enterprise Content Management (ECM) solution. Provide detailed information on the solution’s overall imaging/workflow integration tools/technology/methodology, including a description of how the proposed solution will maintain acceptable levels of performance when the imaging/scanning functionality will be split between the Government Cloud Services Subcontractor and on-premise scanners.
2. Describe how the proposed ECM solution includes multiple staff members and hand-offs, the ability to trigger workflow initiation and progression based on document issuance or receipt, the ability to add notes and comments to a specific case, the ability to generate and attach correspondence or other supplemental files to the case, the ability to set reminders, and the ability to track and report on cases over time.
3. Provide a detailed explanation of how your system integrates with your recommended ECM product. Specifically:

(i) Line of Business (LOB) integration;

(ii) Self Service integration;

(iii) Mobile integration;

(iv) Indexing and Workflow;

(v) Bulk imports; and

(vi) System generated output, including reports, forms and letters.

1. Provide the file import and export formats that are supported.
2. Describe the level of expertise that is needed by EUTF staff to create a new workflow.
3. Does the proposed solution provide a graphical workflow design and configuration tool? If so, describe the tool. In addition, which business process modeling notations, such as BPMN or UML, does it support?
4. Provide a detailed explanation of how new workflows are created and maintained.
5. Indicate whether the proposed workflow system supports business process modeling and business process simulation.
6. Please provide a sample workflow tracking and flow report.
7. Describe how the proposed workflow system conforms to industry standards, such as interface specifications of the Workflow Management Coalition (WfMC), and uses Business Process Execution Language (BPEL) to describe the orchestration of services within the business processes.
8. Describe how EUTF will be able to measure workflow performance and report upon EUTF’s internal service levels.
9. Describe how work and work-in-progress is managed in the proposed solution. Specifically, include a discussion of how member and employer interactions and the complete end-to-end retirement processing are handled.
10. Describe the Manager/supervisor dashboard capabilities. Describe how work and work-in-process is visually represented, include a discussion of frequent the dashboard is refreshed and how real-time alerts, notifications and messages are handled.
11. Indicate how many workflows and of what complexity level would be required to satisfy the requirements of this RFP.
12. Describe how the proposed solution supports case management.
13. Describe how the proposed solution incorporates non-EUTF user actions/tasks within a workflow, such as a member or employer performing a step within a workflow.
14. Provide a brief narrative description of how your solution complies with the technical requirements in the Imaging/Workflow section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
15. Describe how the proposed solution manages a static content knowledge management repository. Also discuss how content is added, updated, and removed from the knowledge management repository.
16. Provide a brief narrative description of how your solution complies with the technical requirements in the Self-Service section of Appendix C: *Technical Requirements*. Include the information you believe EUTF will find useful in evaluating the strengths of your solution.
17. Describe the current mobile capabilities of the solution. Also, discuss the product roadmap for the mobile capabilities. Provide sufficient details on how the mobile capabilities are designed to help EUTF to serve all their clients and other key stakeholders.
18. **Maintenance and Support**
19. Describe the general structure of your Maintenance and Support plan along with any options available. Please describe how your Maintenance and Support plan will support compliance with Performance Standards described in the Special Conditions Exhibit A – Exhibit B. ***OFFERORS WILL NOT INCLUDE ANY ASSOCIATED COSTS IN THE TECHNICAL RESPONSE.***
20. Can standard support be available from 7:30am to 4:30pm Hawaiian Standard Time, Monday – Friday?
21. How is after hours support provided?
22. Describe how an issue is escalated if there is not an immediate solution.
23. How would EUTF report a new issue or problem?
24. How are existing issues tracked?
25. How often are software updates scheduled?
26. Describe the process by which software updates are released and how EUTF would implement these software updates.
27. In what way is the Offeror’s customer support superior to other competitors?
28. Will the Offeror guarantee that EUTF will receive primary customer support from a staff member thoroughly trained in the proposed solution for EUTF? Will these staff members be assigned to the project at least three months prior to initial go-live? Will the Offeror guarantee that these staff members will remain EUTF’s primary support for at least 18 months after final go-live?
29. Will the Offeror guarantee that EUTF will have primary contact through a project manager assigned to the project at least three months prior to initial go-live, subject to approval by EUTF? Will the Offeror guarantee that the project manager will remain EUTF’s primary contact for at least 18 months after final go-live?
30. What are hourly changes (if any) for the following types of service (by role)?

|  |  |
| --- | --- |
|  | Hourly Rate |
| Customer Representative |  |
| Project Manager |  |
| Programmer/Analyst |  |
| Database Administrator |  |
| Network Engineer |  |
| System Administrator |  |
| Other (please specify) |  |

**OFFEROR’S APPROACH**

Approach & Methodology

1. Explain your requirements gathering/design/development/testing methodology that will be used in this Project.
2. Describe your software development and BAS implementation methodology (i.e., Agile, hybrid, waterfall) and why you believe this is the best approach for EUTF.
3. Indicate what formal methods and disciplines will be employed to effect high-quality releases of functionality.
4. Describe the formal methods and disciplines that will be employed for testing each release of the proposed solution (e.g., unit, regression, system, QA, performance, and stress).
5. Describe how you manage version control and build releases and how they are documented.
6. Describe and discuss how software version control is implemented and how updates and upgrades will be coordinated with EUTF’s computing environment. Also, describe how the solution will be able to track source code changes between versions for audit and control purposes. Also, describe how version compatibility will be maintained among the various products of multiple vendors.
7. Describe each environment (e.g., development, testing, training, and staging) and the approach/methodology for installation/patching/configuration of hardware/software. This approach must address the roles of different stakeholders, including EUTF’s IT staff in the process. Include specific examples how you have engaged client IT staff in the process from previous engagements.
8. Describe your implementation approach. Also, discuss whether the proposed Implementation approach is single phased or multi-phased. Also, discuss where these approaches have been used with your prior customers.
9. Will there be software releases during the implementation and will EUTF be required to include the releases? Provide a description of how these are planned for and included.
10. Based on experience with projects of similar size and scope, describe the level of staffing support required of EUTF during the Project phases outlined in your Implementation Plan, including but not limited to, the following Project phases:
11. Project planning and initiation;
12. Development of the detailed design document;
13. Project implementation;
14. Warranty period; and
15. Post-Warranty period

Be specific in describing the number of positions required, roles, responsibilities, and prerequisite skills of all EUTF staff members by Project phase.

1. Describe how you will work with a Data Conversion Vendor to perform data testing and resolve issues during the testing and implementation.
2. Describe all Deliverables and Milestones. What are the Milestones in the Project? What are the Project Deliverables listed by Milestone and Phase? Please include a detailed enough description to give EUTF a good understanding of content and include completion criteria. Please include the same Milestones in Attachment 2, Offer Form OF-2.
3. Provide a Implementation Plan.
4. Provide a Project Resource Plan.
5. How is converted data tested? When does this occur?
6. EUTF mandates that the Offeror test utilizing a representative, anonymized data set, not a selective set of “clean” data or data containing PII. Describe whether the proposed system will facilitate the creation of anonymized test data from a production data source.

1. What do you consider to be a maximum Defect rate on go-live for the system that the Offeror plans to implement for the EUTF?
2. Indicate which automated testing tools that you have used in similar projects and which tool you propose to use for this Project.
3. Indicate which tools that you have used to develop and maintain network diagrams and schematics for similar projects and which tool you propose to use for this Project.

Self-Sufficiency

1. Explain how your approach/methodology will help accomplish EUTF’s goal of a self-sufficient maintenance and support model after System Acceptance. Ongoing production support will be performed by EUTF resources, with EUTF resources eventually fulfilling an estimated 50% of all production support demands after training. Specifically discuss:
* Creation & maintenance of Form letters & e-communications
* Creation & maintenance of queries & reports
* Creation & maintenance of interfaces
* Creation & maintenance of workflows
* Creation & maintenance of batch jobs
* Addition, modification & deletion of plans and rates
* Addition, modification & deletion of business rules
1. Describe the pros, cons, and potential risks of EUTF’s planned post implementation self-sufficiency objectives.
2. Provide a sample IT Operations Manual, Business User Manual, and Business Procedure Manual.
3. How will you ensure that training and user documentation is continually updated as the product evolves in the future?
4. Provide an estimate of EUTF IT resources by type during implementation and after the final Phase Go Live necessary to supports EUTF’s goal of operational self-sufficiency.
5. Provide examples of similar projects in which the client became self-sufficient after the final Phase Go Live. Include which components of the solution were supported after the final Phase Go Live.
6. Provide a list of required and recommended certifications and product training that EUTF IT staff should possess to support and enhance the infrastructure and underlying software.
7. Indicate whether you provide certification in your proposed solution. If so, please describe the certifications and levels of certification.
8. Describe how you have managed this type of knowledge transfer successfully in the past.